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Q3 2024

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# Licensing in the lead

Thunderbird bakes toyetic value into its third-party pipeline

Kids sports content: A top entertainment draft pick | Video game takeovers heat up

CHRIS HEMSWORTH
BRIAN TYREE HENRY
SCARLETT JOHANSSON
KEEGAN-MICHAEL KEY
LAURENCE FISHBURNE
JON HAMM
TRANSFORMERS
ONE
DISCOVER THE ORIGIN BEHIND THE RIVALRY
PARAMOUNT ANIMATION AND HASBRO PRESENT IN ASSOCIATION WITH NEW REPUBLIC PICTURES A di BONAVENTURA PICTURES PRODUCTION A TOM DESANTO / DON MURPHY PRODUCTION A BAY FILMS PRODUCTION
"TRANSFORMERS ONE" CHRIS HEMSWORTH BRIAN TYREE HENRY SCARLETT JOHANSSON KEEGAN-MICHAEL KEY STEVE BUSCEMI WITH LAURENCE FISHBURNE AND JON HAMM MUSIC BY BRIAN TYLER EDITOR LYNN HOBSON
EXECUTIVE PRODUCERS STEVEN SPIELBERG ZEV FOREMAN OLIVIER DUMONT BRADLEY J. FISCHER B.J. FARMER MATT QUIGG PRODUCED BY DON MURPHY & TOM DESANTO LORENZO di BONAVENTURA, p.g.a. MICHAEL BAY MARK VAHRADIAN, p.g.a. AARON DEM, p.g.a.
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**OUR SOLD COVER** features an ad for a new toy called Tile Town from Moose Toys, while our editorial cover spotlights JAM Media's *BeddyByes*, which was recently picked up by Thunderbird Entertainment.

**For more information, please contact:**
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BBC Studios Kids & Family Productions, BBC Children's & Education co-production

# Nelly Jelly Show's Unique Characters and Relatable Adventures are Set to Captivate Children Worldwide

**Known for her imaginative adventures and lovable monster friends, six-year-old Nelly Jelly offers a fresh take on childhood challenges.**

Nelly Jelly, a beloved children's brand originally known as Kakė Makė in Lithuania, has been enchanting kids since 2010. What began as a book character has evolved into a multi-faceted franchise, including film, animation, musicals, theater, and more. Through animation and its lively content, Nelly Jelly aims to positively impact millions of children worldwide.

To transform Nelly Jelly from a Lithuanian favorite into a global phenomenon, creators from NJ World have teamed up with the British-based 3Megos animation studio, with a co-production team including Emmy and BAFTA award-winning scriptwriters Paul Larson and Laura Beaumont. The two writers have worked on popular shows like Bob the Builder and Thomas the Tank Engine, as well as for studios including Disney, DreamWorks, and Aardman.

Martin Lowde

"We're confident that Nelly Jelly's relatable and entertaining stories will captivate kids worldwide, just as they have in Lithuania," said Martin Lowde, the CEO of 3Megos.

## Why Gen Alpha loves Nelly Jelly

The Nelly Jelly show resonates with Gen Alpha, combining clever storytelling with vibrant visuals. Nelly Jelly, a six-year-old with a vivid imagination, navigates typical childhood challenges with optimism and creativity, often drawing on her monster friends, Jim and Jam, for imaginative solutions.

Paul Larson

"Children love color, simplicity, and things that make them laugh. And with Nelly Jelly, that's exactly what you get. The monster characters are big, funny, and caring rather than scary," head writers Laura Beaumont and Paul Larson highlighted. "We loved exploring Nelly Jelly's relationship with the two monsters. Her acceptance of their crazy ideas and the monsters' caring nature add a unique and entertaining twist."

Reflecting on other successful projects, the creators noted the energetic and humorous nature of Nelly Jelly. They observed that shows with similar energy and humor to Nelly Jelly include The Magic Roundabout, Pop Paper City, Tickety Toc, Mush-Mush and the Mushables, Dennis and Gnasher, and Poppy Cat.

## The origins of the IP

The first Nelly Jelly book series was created by illustrator and author Lina Žutautė in IP's native country, inspired by her son's curiosity and imagination. She wrote the books to address his questions, sparking his interest in exploring and understanding the world. Nelly Jelly embodies this curiosity, delving into everything from natural phenomena and rules to friendship and the unknown.

Nelly Jelly's transition from book illustrations to CGI animation highlights the fun and unique design of the IP. Mark Vale emphasized the importance of preserving the original quirky look, adding fur to the monsters to enhance their lovable, cuddly appeal, and maintaining Nelly Jelly's distinctive hairstyle and wide-set eyes.

Laura Beaumont

"We're really happy with how the characters look in both stills and animation. They stand out in the market and bring distinct personalities and physical traits, adding a lot of comedy to the show," says Mark Vale.

## Nelly Jelly's local success expands to a global audience

In the native market, Nelly Jelly's merchandise series sold over 2 million products in 2023 within a target market of 140,000 and a 2.6 million population. The IP has sold around 2.3 million copies of its picture books and its top titles have achieved print runs of 30,000 copies each, significantly higher than the market average of 3.000 copies.

Mark Vale

"We have faith in what we're doing from the writing team to the designers to the animators. We know we're creating something special and unique that has a place in the market. The track record of the brand is very impressive, so in Nelly Jelly, we have a series with pedigree and an established history of success that is important to broadcasters," says Mark Vale.

Simona Krasauskienė

"In Lithuania, Nelly Jelly is not only a determined and curious little girl. She is a childhood companion of many Gen Alpha children who are growing with her positive, problem-solving attitude," said Simona Krasauskienė, the CEO of NJ World. "With Nelly Jelly characters, we have a concept that's proven to work. Our in-depth knowledge of the native market, coupled with our success at home, positions us to inspire kids and their parents in other countries as well."

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# Kid a-peel

The draw of a prank show is pretty much universal. Kids and adults alike can find humor in watching the unsuspecting victim stumble into awkward or surprising situations. That appeal is one of the reasons why prank shows are once again gaining traction, as we write about on page 34.

That's fine when you're the viewer, but very rarely do people like to see themselves as the subject of the prank. It's also not as common to be the person who is pulling the prank. There is, however, one circumstance where people tend to feel they are playing the prankster and the prankee at the same time, and that's when they're starting a new job—especially if that job happens to be in a new industry. And that's exactly the situation I'm finding myself in right now.

For those of you who don't know me—and at this point, that's most of you reading this page—I'm Carolyn and I'm the new editor of *Kidscreen*. Hi.

Stepping into this role is exciting. I get to work with a talented team of reporters, editors and graphic artists, as well as sales professionals, conference planners and other members of the Brunico team whose work allows us to get the magazine out and the daily newsletter in your inbox.

Joining *Kidscreen* now means that I'll be able to play a role in covering an industry that's undergoing revolutionary change, and that's always a desirable situation for any journalist...even if it's a time of stress and anxiety for members of that industry who are trying to figure out what's coming next, how it will affect them, their suppliers and their customers, and how they'll ensure they'll survive and thrive in the new business landscape.

I have confidence in my ability to tell the tale of how the kids entertainment industry is being transformed, thanks in large part to news instincts and reporting skills that I've sharpened over the years covering a wide range of stories and industries for trade publications, daily newspapers, news websites and consumer magazines. But as somebody in a new role, I'd be lying if I said I didn't have the tiniest bit of doubt that I'm somehow acting as the prankster and setting myself up for a spectacular face-plant.

Maybe I'll trip on something that's obvious to everybody in the industry but that's invisible to me and wind up the prankee. Even if that happens, that's OK. Everyone who tries something new is at risk of slipping on the proverbial banana peel as they get their feet under them, and I'm certainly no exception.

What seems to be different, however, is this industry itself. Everyone I've spoken with so far has emphasized how nice and caring the people are, which, when you think about it, makes a lot of sense. They're devoted to entertaining children, a process that involves not just capturing their eyeballs for a few minutes, but teaching kids lessons, building up their resiliency and showing them the wider world. I'd expect an industry like that to be welcoming to newcomers.

So, as a newcomer, if you happen to see me in Cannes at MIPCOM or MIP Junior, please stop me and say hello. I'm looking forward to getting to know you.

—Carolyn Gruske

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# THE LIST

10 things on our radar this month

## 1 Are you regulation-ready?

The laws around children's online safety in the US are about to change. Two bills—the Kids Online Safety Act (KOSA) and Children and Teens' Online Privacy Protection Act (COPPA 2.0)—are currently making their way through the halls of government, and if they are passed into law, they'll have major effects on how tech companies engage with kids.

COPPA 2.0 bans advertising that's targeted at kids under 17 (up from 13) and restricts what info companies can collect. And KOSA will require companies to provide more options to let kids protect their info and opt out of algorithmic recommendations. The FTC also plans to create a Youth Marketing and Privacy Division to enforce the duty of care the bill puts on companies. And if the punishment for violations is anything like what it has been for the OG COPPA, companies could face lawsuits from the FTC—such as the one it launched against TikTok in August—and massive fines. (In a record example from 2022, *Fortnite* maker Epic Games agreed to pay a record US$275 million for violating COPPA guidelines.)

## 6 Licensed to grow

The licensing sector grew by 4.6% and generated US$365.5 billion in global retail sales last year, with entertainment/character brands comprising 41.4% of this total. Licensed toys accounted for 32% of all toy sales in 2023, providing a shot in the arm to the overall toy category, which experienced a 4.5% sales dip.

## 7 Toons drive ticket sales

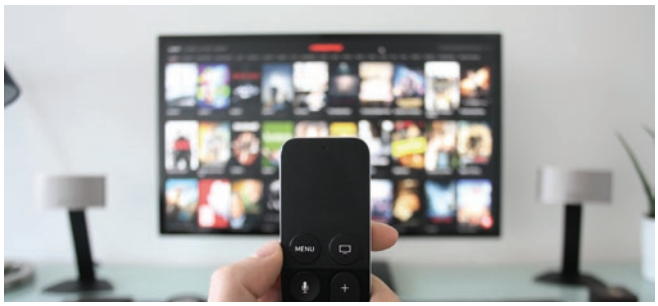
Animation sure flexed its box-office power this summer. At press time, Pixar's *Inside Out 2* was the top-grossing movie of 2024, and Universal/Illumination's *Despicable Me 4* was ranked third. *Inside Out 2* also became the highest-grossing animated film of all time, beating *Frozen II* with US$1.6 billion.

## 2 Finding the right balance

BBC Studios is repositioning for growth—an effort that has triggered layoffs and a significant restructuring. The pillar of the company's new strategy revolves around leveraging preschool powerhouse Bluey, which the Beeb's commercial arm will foster under two new brand and licensing teams. And former Sky exec Zai Bennett will return to head up production in November.

## 3 The M&A saga concludes

Skydance Media won Paramount's blessing for its US$8-billion merger bid in July, with a vision for a "new Paramount" that prioritized animation. Then in August, businessman Edgar Bronfman Jr. tossed his hat in the ring with a last-minute US$6-billion bid—and Paramount extended its go-shop period to review his offer. But in the end, Skydance's proposal emerged victorious.



## 4 Bundle up for stormy weather

Is bundling the next big streaming strategy to reduce churn? Disney and WBD formed a surprise pact in July to launch a Disney+/Max/Hulu bundle. Netflix is taking a more selective approach and avoiding direct bundling with rival streamers, although it seems open to working with internet providers like Comcast, which dropped a Peacock/Netflix/Apple TV+ bundle in May.

## 5 Testing e-commerce waters

Warner Bros. Pictures became the first studio to sell tickets on Roblox, testing out a virtual Fandango box-office experience with Tim Burton's *Beetlejuice Beetlejuice*. The project marked Roblox's third foray into real-world e-commerce, after recent experiments with Walmart and e.l.f. Cosmetics. The move could attract more high-profile brands if the ROI on these activations proves to be lucrative.

## 8

### The new influencers

VTubers—2D/CG-animated avatars—may be poised to usurp YouTubers and live-streamers in the influencer realm. A recent partnership between Sanrio and Nippon TV subsid ClaN Entertainment to finance and launch more of these characters might be a sign of growth to come.

## 9

### Damage control

Cracks are beginning to form in MrBeast's vast YouTube empire, with its biggest star, Jimmy Donaldson, embroiled in a string of controversies. But despite the backlash, fans continue to flock to the channel, and *Beast Games* has resumed filming—possibly proving once again that there's no such thing as bad publicity.

## 10

### Papers, please

Kids brand owners are registering their licensed products through a new digital passport service called Fabacus that delists counterfeit goods from e-commerce platforms. The tech is only available in EMEA so far, but it could be a solution to fight against the global pirated products industry (worth US$3 trillion a year).

# Putting children last

Shaw Rocket Fund head Agnes Augustin suggests three ways the industry can fight for kids programming and be responsive to the needs of both the market and future generations.

BY: AGNES AUGUSTIN

In a world where cost-cutting has become the norm due to post-pandemic recovery, inflation and improving the bottom line, children are being left behind.

That's especially true when it comes to legacy media companies. Producers around the world rely on US-owned channels either commissioning shows or acquiring them. Around 48% of all European children's channels are US-owned, according to the European Audiovisual Observatory. And while many are still active, the contraction in children's content at US studios has had a profound international impact.

In Canada, kids channels owned by WildBrain and Corus are experiencing significant financial challenges (for many reasons, including the impact of last year's WGA and SAG strikes). The CRTC recently granted Corus precedent-setting relief by reducing its Canadian content spending obligation on scripted dramas, comedies and long-form docs to from 8.5% to 5% (estimated at CAD$31.8 million in 2023), allowing Corus to shift its spend to news and reality shows. Depending on interpretation, Corus might also be free from this obligation—which includes Canadian children's programming—for the remainder of its three-year license term.

This ruling sets the stage for ALL Canadian broadcasters to ask for relief from their Canadian content obligations. What this means is that Canadian broadcasters could potentially reduce the amount of Canadian content they commission—and under the current structure in Canada, these commissioning licenses trigger most of the available domestic funding that a producer needs to finance their shows. This would ultimately result in another hit to the commissioning of kids content in Canada.

The responsibility for creating children's programs seems to have fallen on public broadcasters. And those that rely on an appropriation of funds from governments are experiencing budgetary reductions of their own (while also balancing their vast public mandates), which is impacting the amount of children's content being produced. But there's really no way they can compensate for the significant reduction in kids content investment from private networks and studios. And frankly, they shouldn't, even if they could, because the difference between private and public broadcasting strategies ensures a diversity of stories, voices and business.

We keep hearing that kids have access to lots of shows, so why does it matter? Well, children's programming fosters positive values, builds diverse cultural awareness and pride, and sparks imagination and critical thinking through a mix of entertainment and education. Exposure to quality content can lead kids away from the more negative and sometimes toxic content that's widely

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available to them. It can also lead to healthier media consumption habits as they grow up and become adults.

Enhancing the well-being of children with new and relevant stories that help them navigate the world far exceeds the "burden" of financial investment in new kids content. And yet, legacy companies, governments and regulators no longer seem to value the importance of the kids media sector. Any feeling of responsibility to children seems to have been lost.

Don't get me wrong, kids are finding and enjoying lots of content online. In addition to gaming, they watch shorts and user-generated videos there, plus kids TV shows or repurposed content that was developed and paid for by traditional media companies and TV studios. But if we don't figure out how to finance and create new and relevant programs that are reflective of the world kids live in, we will have failed them.

We simply have to adapt to the technological landscape that has revolutionized the way kids consume content, and we must also invest in new content that sets a higher standard on those platforms.

Generation Alpha (born from 2010 to 2024) will be the largest generation in the history of the world by 2025, when it's estimated to hit two billion people (McCrindle). This cohort already represents 18% of the total population in the US (worldpopulationreview.com). And kids and youth under the age of 18 made up 20% of Canada's population in 2022, when the country's last census was conducted.

Gen Alpha began being born in the year that the iPad and Instagram launched. These kids grew up with Siri and Alexa, and are now experiencing rapid AI advancements. We must offer families trusted content in the way kids consume it, now and in the future. This will require considerable private and public investment.

There was some hope in Canada about the implementation of Bill C-11, known as the Online Streaming Act. The bill was created to bring foreign-owned online undertakings under CRTC regulation, leveling the playing field between traditional broadcasters and streaming services such as Netflix and Disney+. It would mandate foreign streamers operating in Canada to contribute an estimated CAD$200 million towards Canadian-made audiovisual and audio programming.

## We need to find our way back to prioritizing children and creating meaningful, relevant content for them.

As it currently stands, the CRTC decision (Broadcasting Regulatory Policy CRTC 2024-121) will not benefit children's content, as it did not direct or even incentivize any of the recipients to consider kids in their remit. (Significantly, the Rocket Fund—Canada's only dedicated fund for children's and youth content—was not guaranteed an allocation, and it's uncertain whether the fund will even be a beneficiary.)

Looking at the European Union's Audiovisual Media Services Directive (AVMSD) as a point of comparison, streamers have been supporting the regions where they operate for a few years now, through local spend on IPs they own and also investing in local content. From a contribution standpoint, this very complex system appears to be working. And yet, while the AVMSD has provisions to protect kids online, there is no apparent directive specifically for the creation of children's content.

We need to find our way back to prioritizing children and creating meaningful, relevant content for them. But how can we do this when the global kids industry is contracting at what feels like a record pace? First, we need to develop global partnerships through co-productions and joint licensing to continue to create great media experiences for children while we work on solutions. Rocket Fund is already seeing a significant increase in the number of co-productions involving Canadian producers. Second, we need a global movement to raise awareness of the importance of high-quality children's content for today's media-savvy and "glocal" kids.

Third, we need to source partners who believe in the power of media for kids, and who want to invest in our sector and, more importantly, invest in children and their future. With any luck, this could bring legacy businesses back into the kids content market and help convince governments and regulators to prioritize our children. Our industry is the most influential and powerful medium of communication for children. We have a responsibility to help them navigate the world they live in. We know how to enrich their lives, give them hope and empower them through the content we produce. Now we need a movement.

As president and CEO, **AGNES AUGUSTIN** is the driving force behind Shaw Rocket Fund's ongoing commitment to the betterment of Canadian children and youth through strategic investments in media content within a social enterprise model.

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Getting the BBC on board as the first broadcaster for *BeddyByes* is helping Thunderbird develop toy and publishing extensions earlier than usual

# Licensing in focus

To stand out in the distribution market, Thunderbird Entertainment is taking a more holistic approach to its third-party roster—one that prioritizes toyetic value and consumer products planning.

BY: SADHANA BHARANIDHARAN

For Vancouver-based producer/distributor Thunderbird Entertainment, consumer products are never an afterthought. In fact, they have become a main driver when it comes to project development, and especially third-party pick-ups.

It's a strategy that has been brewing under the leadership of Richard Goldsmith, who joined Thunderbird in 2021 to head up its brand-new global distribution and consumer products division as president. Goldsmith is well-versed in this area of business, having overseen The Jim Henson Company's third-party banner Henson Independent Properties from 2011 to 2016.

But his vision came into sharper focus last year when the company set up Thunderbird Brands to focus on managing the licensing and merchandising business for both in-house and select third-party content. This new stand-alone division works hand in hand with Thunderbird Distribution, which manages media sales for the same titles.

Goldsmith says Thunderbird will pick up global distribution and consumer products rights to just two or three titles per year. It may come in as an investor before a project is completed, putting up a distribution advance/minimum guarantee in exchange for media and CP rights, but each property will likely have its own specialized funding model.

"We have a fund [earmarked] every year that we can deploy just for these acquisitions," he notes. The amount varies based on distribution and CP sales projections for each IP, and Thunderbird can help get shows over the line and into production by securing enough presales to fill any remaining gaps.

Serving as global brand manager for both media sales and consumer products/experiences also puts Thunderbird in a unique position to streamline multiple tasks under one roof, including trade advertising, conventions/markets and direct-to-consumer efforts like the creation of YouTube channels. Handling media sales and consumer products together isn't something most distributors do, but Goldsmith says there are advantages to this level of coordination. "If I sit with [a big buyer] from a major retailer, they know that our company controls everything under one roof. They don't have to [go elsewhere to meet] the licensing agent and [multiple] distributors."

The company is also working with several toy consultants to develop toyetic elements for its third-party roster—a tactic that ensures the play patterns of each series are mined to their full potential.

## Three's company

So far, Thunderbird has bagged three third-party properties for its unique CP treatment: Windy Isle Entertainment's live-actioner *Mittens & Pants*, dialogue-free series *BooSnoo!* (Visionality Media and Mackinnon & Saunders), and the newest pick-up, *BeddyByes* from Ireland's JAM Media. True to its holistic brand-building ambitions,

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**For more information, please contact:**
**johanna.veysset@pvpdistribution.com**

**MIPCOM Stand: P4.C20 (Québec Stand)**

With input from toy companies and consultants, an early sketch for the *Mittens & Pants* set (left) turned into a colorful playground for the show's live animals

Thunderbird is customizing strategies for each series with an eye on elevating their consumer products value.

*Mittens & Pants* (81 x seven minutes) is a unique show for Thunderbird, with its focus on animals and its live-action style. The company brought in Darren Lee Phillipson, who previously worked in senior product design/development roles at Fisher-Price and Disney, to serve as its toy consultant on *Mittens & Pants*.

The series underwent pivotal tweaks to add more color to the show's sets well ahead of filming. And by the time the cameras got rolling, conversations with US toycos had also commenced, giving them an early look and getting early feedback on how the show's signature elements would eventually translate into plush and playsets.

*Mittens & Pants* is currently available on 10 platforms in the US, including Peacock, Tubi, Roku, HappyKids and Kidoodle.TV. In other international territories, Thunderbird focused on locking down specific partners to join the show's commissioning broadcasters CBC Kids (Canada) and Sky Kids (UK)—such as Hop! Channel (Israel), DR (Denmark), France TV and Warner Bros. Discovery, which picked it up for Cartoonito, Cartoon Network and Boomerang in Australia, New Zealand, Southeast Asia, Hong Kong and Taiwan.

Coming from a different starting point, *BooSnoo!* was fully financed when Thunderbird got involved. It was Lucy Murphy, director of kids content & ROI at UK broadcaster Sky, who brought the show to Goldsmith in April 2023.

Following the path of a small red ball through different landscapes, this 41 x seven-minute series was uniquely crafted to appeal across multiple audiences—though one of its primary goals is to entertain neurodiverse kids by aligning with their content preferences, it also works as a calming/relaxing series for all viewers. So when it comes to consumer products, there's a unique opportunity to explore product categories and development for neurodiverse kids, in addition to a more mainstream audience.

Thunderbird has bagged deals with terrestrial broadcasters in key markets like Canada (TVO), South Korea (EBS), Hong Kong (PCCW), Sweden (SVT), Denmark (DR) and Norway (NRK). And in the UK, Sky Kids is timing the series to air strategically throughout the day during times when kids are likely to need a break. It's currently one of the broadcaster's top-rated series.

When it comes to *BeddyByes*, it's all about helping parents of young children deal with two major family life pain-points—mealtime and bedtime. Commissioned in June by CBeebies, this 52 x 11-minute toon helps toddlers and young preschoolers learn and get used to daily routines. It's a premise that fills a "huge hole in the market" to help parents, says Goldsmith.

*BeddyByes* has also been picked up by YLE (Finland), DR (Denmark) and RTÉ (Ireland). On the licensing front, having a major broadcaster like the Beeb attached from the jump helped Thunderbird start conversations with toy and publishing companies much earlier than usual, and the company is also planning a BeddyByes podcast that should tap into the strong performance of bedtime-centric kids titles in the audio market.

## Future pickups

Reiterating its niche focus, the Thunderbird team is keen to field pitches for kids TV concepts that are toyetic and have potential to break into categories where there's no leading IP at the moment, such as arts & crafts, for example. Evidenced by its picks so far, preschool seems to be a a sweet spot—but Goldsmith is actually open to anything from 18 months to 12 years when it comes to target demo.

Concepts for older viewers need to present an "extraordinary opportunity" in toys or gaming, he says. For example, Thunderbird is selling Atomic Cartoons' *Mermicorno: Starfall* (26 x 22 minutes), which targets a slightly older crowd of five- to nine-year-olds, but the 2D-animated series also has solid licensing potential since it's based on partner tokidoki's existing collectible merch brand.

Though the show is months away from debuting next year on Max (US), Thunderbird has already signed Jazwares (master toy partner) plus a master publishing partner that it will announce soon. It has also set up a large QSR promotion in the US next spring.

With all this momentum brewing for just three IPs, Goldsmith and his team are bullish about Thunderbird's bespoke third-party business. As it looks ahead to year two, Thunderbird is open to pitches from all sources, including broadcasters who want to bring in an experienced producer/distributor on a series they've already commissioned.

The company is also about to expand its consumer products team, and has plans to start funding co-development on original series involving Atomic Originals and third-party partners. K

Cyber Group Studios

2D/CGI 26X22'

# ALEX PLAYER

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# BIG GIG Emma Hardie

**THE BIG GIG:** Executive commercial and brand director at Aardman Animations

**PREVIOUSLY:** Commercial director, global entertainment at BBC Studios

**COMMERCIAL STRATEGIES:** Emma Hardie started her career working in production and development roles for multiple studios on feature films such as *Paddington* and *Rush*, building up an affinity for storytelling. Looking to combine her production and business experience, she made the jump to BBC Studios in 2016 and spent the next seven years overseeing the company's factual entertainment, international production and investment strategies in several commercial director positions.

She stepped into her newly created role at Aardman in April, excited to oversee her first set of animated IPs. Hardie's remit is to define and deliver commercial strategies for the company's entire brand portfolio, focusing on everything from new series financing and distribution, to brand-building through licensing and marketing.

**LOOKING TO PARTNER:** With experience that spans all parts of the value chain, her first challenge is to maximize the commercial potential of *Wallace & Gromit, Shaun the Sheep, Morph* and *Chicken Run*, all while tackling the industry-wide issue of tightening production budgets. To mitigate rapid market changes, Aardman is now actively looking to sign multi-year deals with brand partners and collaborate with co-producers to share some of the risk in bringing more animated projects and interactive experiences to fruition.

**FUELING FANDOM:** Besides hunting for new partners, another key pillar of Hardie's strategy is to leverage Aardman's characters and licensed offerings to build up its consumer base. She sees demand from audiences wanting to engage with the studio's brands beyond the screen—particularly in its key growth markets of Asia and the UK. While these regions fuel much of the company's consumer products and location-based entertainment business, Hardie says the next goal is to use Aardman's digital communities to develop new audiences. Initially, she plans to target more than 17 million followers on its YouTube channels and social platforms with digital-first content featuring IPs including Wallace & Gromit.

Hardie has also earmarked gaming platforms like Roblox as a way to engage with Aardman's digital audience. Shaun the Sheep made his debut there last February in *The BBC Official: Wonder Chase* game, which has been played more than 1.5 million times to date. And there are many more digital experiences in the works as the studio gears up for its 50th anniversary in 2026, she adds.—Cole Watson

# ...IN BRIEF

More people moves that are sure to shake up the industry.

BY: JEREMY DICKSON

## Andy Yeatman

CEO
**Miraculous Corp**

With big plans to grow the already expansive Miraculous universe with more movies, spinoff shows and new characters, it's not surprising that Mediawan and ZAG tapped pedigreed kids brand-builder Andy Yeatman as CEO of their new joint-venture Miraculous Corp and its global ops. Yeatman is fresh off a six-year stint at Moonbug, where he was instrumental in moving YouTube brands like CoComelon and Blippi into linear TV, theatrical and audio distribution.

## Hannah Minghella

Head of feature animation and live-action family film
**Netflix**

Reporting to new film chief Dan Lin, Hannah Minghella joined in June from Bad Robot, where she worked across live-action, animation and documentary features. Although Netflix remains optimistic about its animated features business, and recent films like *Nimona* and *Leo* have generated high viewership numbers, Minghella's unique experience overseeing both animation and live-action franchises will bolster the streamer's ability to bring more variety to its family film slate, said Lin.

## Pablo Zuccarino

Head of kids and animation in LatAm and international portfolio strategy
**Warner Bros. Discovery**

As part of a major global kids team restructure in July, WBD expanded the remit of longtime LatAm kids chief Pablo Zuccarino by adding international portfolio strategy to his suite of responsibilities. Well-respected in the kids media landscape, Zuccarino is tasked with delivering WBD's content for younger viewers "in the most impactful way across the globe," according to Vanessa Brookman, GM of kids, global streaming and international networks. This promotion follows the departure of industry legend Adina Pitt after 16 years with the company.

# Cyber Group Studios

# Anatomy of an adaptation

How Holly Smale's *Geek Girl* crossed over from print to become one of this year's breakout TV hits.

BY: SADHANA BHARANIDHARAN

It's been a few months since *Geek Girl* (10 x 30 minutes) made its debut on Netflix and became one of the buzziest shows of the summer.

Based on British author Holly Smale's 2013 novel of the same name, this live-action series generated more than 94 million hours of watch time in its first month alone, and remained in the mighty global streamer's top-10 English TV ranking for four straight weeks.

Its success is immensely rewarding for the team behind the show—especially executive producer Jeff Norton, who has championed this adaptation since its journey to the small screen began more than 10 years ago. Pleased with its viewership numbers, he says: "The most pleasant surprise is that the show has found an audience well beyond the core teenage demographic."

From his perspective as an award-winning author/producer with nearly two decades of experience writing books for young readers (such as tween fantasy *Dino Knights*) and producing kidlit adaptations (including preschool toon *Trucktown*), Norton looks back on *Geek Girl*'s long road to success.

## Finding the north star

*Geek Girl* first landed on Norton's radar in 2013, when he and Smale were on an author tour together promoting their debut novels. The emotionally resonant story stayed with him for years—especially the protagonist Harriet Manners, a socially awkward 15-year-old who is discovered by a modeling agency and becomes the face of a fashion campaign.

One of the first things Norton recommends producers do when they're considering a book adaptation is to identify the "north star" of the story—the crux of its theme and tone. In *Geek Girl*'s case, it was the universality of Harriet, who perfectly captured how everyone sometimes feels like an outsider.

To write the book, Smale drew on her own life experience as a teen model on the autism spectrum. And although Smale wasn't diagnosed yet when she was writing the book, it's evident to readers that Harriet is also neurodiverse (though that's never explicitly mentioned).

With style and heart to spare, *Geek Girl* attracted the interest of many producers who wanted to option the title. But most of them had an Americanized treatment in mind—which Smale always turned down.

"Because it's based on her life story, it was very important to Holly that the project and the character stay British," Norton explains. So when he eventually reached out to Smale's agent to discuss an optioning deal, he made that commitment—and also agreed to honor Smale's wish to be very involved in scriptwriting and producing the series.

These promising discussions paved the way for Norton to secure the option agreement for *Geek Girl*. Option deals usually have a term in the range of 12 to 24 months, during which time the project must lock down financing in order to move on to the next phase, paying the author the exercise price and actually buying the rights to make the project. (While prices vary greatly based

Based on a 2013 novel by Holly Smale, *Geek Girl* hit more than 94 million hours of watch time in its first month on Netflix

on the book, as a general rule of thumb, Norton says the option price is usually 10% of the exercise price.)

## Assembling the right team

He may have won Smale's trust to steer the adaptation, but Norton had limited time to put the project's financing together. And a number of platforms and broadcasters passed on the pitch, saying they felt *Geek Girl* would only pull in a limited audience. "One of the main rejections was that they thought the target audience would be too young," he explains, adding that they felt "viewership would tap out at 12."

Despite these objections, Norton and Smale saw *Geek Girl* as a four-quadrant series that could appeal to every demo and still be family-friendly. Then along came Netflix—the first buyer to share this vision. The streamer's team was keen to ensure that the adaptation didn't come across as strictly kids TV, but as content with broad appeal. "There's a version of [the IP] that could be much more juvenile, but Holly and I didn't want that," says Norton. "And luckily, Netflix didn't want that, either."

The next step was locking down partners to help develop and produce the series. Norton signed London's RubyRock Pictures as the lead producer first—a perfect match given the studio's founder/creative director Zoë Rocha's familiarity with all things fashion from a young age (her father is celebrated designer John Rocha).

Norton also brought in Toronto's Aircraft Pictures as a co-producer, having built a rapport with its bosses while he was consulting for Canadian media giant Corus Entertainment. "I had helped facilitate their [past] acquisition of the company—so I got to know Anthony [Leo] and Andrew [Rosen] well."

The project qualified as a UK/Canada treaty co-production, opening the door to rebates during a crucial time, especially since one of the UK industry's lifelines, the BFI Young Audiences Content Fund, ended in 2022. Going the co-pro route also opened up an opportunity to film in Canada, with a book plotline (where Harriet travels abroad on a whim) strategically tweaked to take place in Ottawa—a setting Norton particularly favored. "The big draw was that Ottawa has a museum with a dinosaur, which was important to the story."

After his Corus consulting stint ended, Norton headed up its Waterside Studios prodco from September 2022 to March 2024. Waterside funded the development of a writers room and scripts for all 10 episodes ahead of *Geek Girl*'s greenlight from both Netflix and Corus in early 2023. Norton also negotiated a non-exclusive license with Corus to carry the show on its STACKTV streamer in Canada, leaving room for Netflix to launch it globally.

The project was now ready to move into the next significant phase—exercising the option. And true to his earlier commitment, Norton brought Smale on board as a credited co-creator, executive producer and writer.

## Down to the nitty-gritty

"Books are great [source material for films or series] because an author has spent years and years of their life figuring out the characters and the story," Norton observes.

Throughout the development process on *Geek Girl*, he sat with the creatives and streaming execs involved to carefully go over the fine points of the script and the visual translation of the book. The writing team had to work hard to maintain the tone of the book, while also making sure the on-screen action was bringing something new to the story for viewers.

One element that sparked a lot of discussion was the show's narration, which took its lead from the book's first-person POV. Ideally, there shouldn't be too much narration in a visual medium unless it's purposeful, Norton says. So the team revised an early draft of the show that had a lot of descriptive narration, axing lines that were basically just reiterating what was happening on screen.

Instead, the writers refocused the narration to explore the thoughts playing out in Harriet's mind. "We use the voiceover whenever she says [or thinks] something that's different to what she's doing, [or] to contradict what the audience sees," Norton explains. In one example, when Harriet meets Nick, a fellow model she's crushing on, she offers him a formal handshake, and her disapproving voiceover exclaims, "A handshake?! Seriously?"

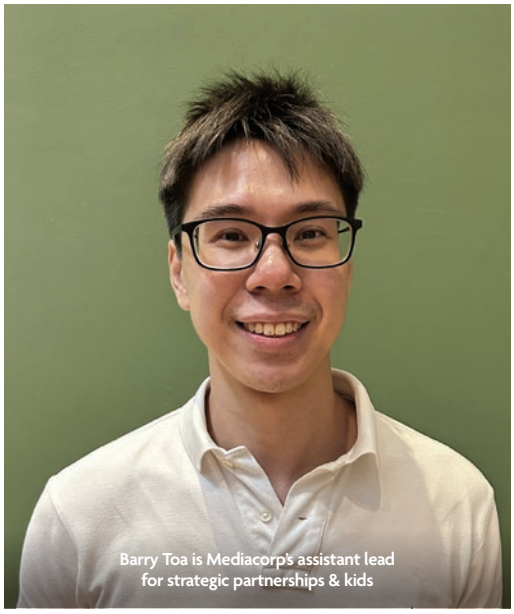
The biggest conversation the team had during development centered around whether or not to identify Harriet's autism, Norton recalls. Netflix agreed not to explicitly name it in the first season; instead, the goal was to subtly portray her neurodiversity through her behavior and let the audience come to the understanding on their own.

"We didn't want this to come across like an issues show," says Norton. "We wanted it to be about a character." Beyond relying on Smale's lived experiences, the team also tapped the services of Kim Wilson's OneFish TwoFish Consulting to ensure authenticity in portraying a neurodiverse lead.

Production on *Geek Girl* began in June 2023 and wrapped in August, with initial filming in London, followed by two more weeks in Ottawa, and then post-production until March 2024. The show's streaming success right out of the gate illustrates the power of a well-executed literary adaptation.

Turning a well-known book into a series seems to be especially appealing in today's risk-averse TV marketplace, and for producers wanting to do so, Norton says it's important to honor what made the source material resonate with readers in the first place.

No news has emerged regarding a potential second season...yet. While the first season wrapped up with an "incredibly satisfying ending," Norton notes that there are eight books in Smale's Geek Girl series, creating the possibility for more adventures on screen. k



Barry Toa is Mediacorp's assistant lead for strategic partnerships & kids

With new eps set to drop in October, *Leo the Wildlife Ranger* is the most-watched show for okto on YouTube

Mediacorp acquired *Oddbods* and its preschool spinoff *Minibods* from Moonbug Entertainment last year

*Biogirl MJ's Wildlife Treasure Hunt* is the third most-watched show on okto's YouTube channel

# THE HOOKUP

*Kidscreen* checks in with new, established or evolving kids content buyers to find out what they're looking for right now.

BY: SADHANA BHARANIDHARAN

Spanning ethnic communities including Chinese, Malay and Indian, and estimated to represent 10% of the population at 580,000 (Statista), Singapore's under-14 set is a substantial TV audience. And national broadcaster Mediacorp has big plans to serve it.

Mediacorp operates the linear children's programming block okto, which airs on Channel 5 (English) daily from 6 a.m. to 3 p.m. and on Channel 8 (Chinese) every Saturday and Sunday from 9 a.m. to 11 a.m. Beyond linear, there's also the mewatch kids streaming hub and the Mediacorp okto YouTube channel (244,000 subscribers)—both of which are intended to help meet the "increasingly fragmented" consumption patterns of today's young viewers, says Barry Toa, assistant lead for strategic partnerships & kids.

To navigate this, Toa has strategized bringing online creators into the mix. Last year, okto teamed up with Singaporean vlogger Biogirl MJ to co-develop a tween series called *Biogirl MJ's Wildlife Treasure Hunt* (five x 23 minutes). The show—in which MJ teaches kids about the country's flora and fauna—launched last September and took just six months to become the third most-viewed series on okto's YouTube channel.

Okto's core target groups are upper preschoolers (four to six) and tweens (seven to 12), and topics like wildlife and science are reliable viewership magnets, notes Toa. For example, Omens Studios' *Leo the Wildlife Ranger* consistently comes out on top as the most-watched content for okto on YouTube.

## What is Mediacorp looking for?

To capture Singapore's Gen Alpha audience, Mediacorp is keen to stock up on live-action, personality-driven, social media-style content, says Toa. "We're on the lookout for influencers open to [co-producing] educational content." He's interested in acquiring completed content for all ages (especially well-known IPs that aren't easily available in Singapore) or getting involved early in project development. Content with multi-language dubs (English, Malay, Mandarin and Tamil) is a major plus.

Expanding on the short-form catalogue is also a priority, so Toa is seeking snackable preschool toons, with a preference for commissioned/co-commissioned titles that come with YouTube rights, as well as STEM content. Singapore has also been trending lately as a setting in the broader world of kids animation—from WBD's *Tom and Jerry Singapore* shorts to Banijay's *Totally Spies!* revival moving its setting from Beverly Hills to Singapore. Toa wants to work with other international IP owners looking to localize their brands by infusing them with Singaporean culture.

## Recent and upcoming releases

The team has bolstered mewatch with more than 2,100 hours of content over the past three years, including package deals signed last year with Moonbug Entertainment (*Blippi*), Pinkfong (*Baby Shark Best Kids Songs*), Hasbro, Iconix and Sesame Workshop. Toa hints at more content on the way from popular Japanese franchises like Beyblade (ADK Emotions) and Ultraman (Tsuburaya). Among its latest commissions, okto plans to roll out new episodes of *Leo the Wildlife Ranger* (80 x 11 minutes) and Mandarin-focused game show *Word Whiz* this October—right after dropping a third season of *Biogirl MJ* in September. k

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peacock

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Cyber Gro
GIGANT
Disney Junior
Disney+
france•tv
NETFLIX
SUPER RTL
tiny POP
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# All jokes aside

There's an uptick in buyer interest for prank shows, and kids producers are getting in on the fun.

BY: RYAN TUCHOW

A ghost scares unsuspecting elevator riders. A machine starts cloning someone while confused bystanders look on. And, in an age-old classic, someone gets a pie to the face.

These kinds of humorous hidden-camera gags and surprises are at the root of a burgeoning programming trend. According to London-based research firm Ampere Analysis, 22 prank shows were commissioned globally in 2022, compared to just 12 in 2021. And even though last year yielded a smaller crop of 15 new commissions, this content category is definitely still on an upward trajectory overall.

Buyers outside of the US are driving much of this demand, says Ampere co-founder and executive director Guy Bisson, and Japanese linear channels are especially interested (they've commissioned 38% of all new prank series since the start of 2022). But some SVOD platforms are driving market growth, too—especially Amazon, which has greenlit eight first-run concepts to stream in five European markets (Norway, Sweden, Denmark, the Netherlands and Finland) in that same timeframe.

The trend is less pronounced in the US, but Stateside broadcasters ordered three prank series last year, up from just one in both 2021 and 2022. And Netflix has already commissioned *The Magic Prank Show with Justin Willman* this year.

Global buyers are recognizing the appeal of showcasing funny, high-quality pranks that can compete with similar clips on YouTube, TikTok and other social media platforms, says François-Xavier Poirier, founder and CEO of Paris-based producer/distributor Novocomedy. The company has a library of more than 120,000 home video, prank and blooper clips (mostly non-dialogue) that it has successfully placed on channels with kids & family appeal, such as Cartoon Network, the BBC and Discovery Channel.

"If the quality is good, then [pranks] are durable and evergreen content that kids will rewatch and want to share with their families," says Poirier.

MIPTV 2024 was the company's busiest market ever—a sign that demand is growing. It secured an agreement there with New Delhi-based Ayanaa Cinematics (*Prince Jai aur Dumdaar Viru* for Sony YAY!) to establish a Novocomedy office in India that will produce 104 episodes of an as-yet-untitled kids & family series starting next year. Hosted by an Indian celebrity, the show will feature hidden-camera gags, bloopers and magic pranks.

"From our experience, there is a noticeable trend and a vibrant market for prank videos in India," says Pinku Biswas, founder and director of Ayanaa. "Audiences—and especially the kids & youth demographic—show a strong interest in light-hearted, entertaining content that includes pranks."

Ayanaa is already in talks with several channels and streamers (both domestic and international) that are interested in picking up the series.

It's no secret why these types of shows are popular with producers and commissioners—they are generally a lot less expensive to make. The budgets can obviously vary depending on the pranks, but an average 12-episode prank show costs between

**Prank shows are starting to gain traction internationally—even in the US, where Netflix commissioned *The Magic Prank Show* earlier this year**

US$500,000 and US$1.7 million, which is easily half the cost of a 12-episode animated series, says Poirier.

In addition to this compelling financing advantage, pranks have built-in humor, their visual nature means they travel well (especially the non-dialogue ones), and they're popular online. Perhaps for these reasons, some of the biggest kids broadcasters in the world have tried their hand at prank shows over the years. Canadian studio Apartment 11 Productions' *Rank the Prank* (13 x 30 minutes) aired for a season in 2016 on CBBC and Nickelodeon. The prodco's first prank show *Prank Patrol* (100 x 30 minutes) ran for four seasons (2005 to 2010) on YTV in Canada and secured format deals for versions on ABC Australia and the BBC. And DisneyXD had its own success with *Walk the Prank* (60 episodes), which ran for three seasons from 2016 to 2018. Its first season averaged more than a million viewers per episode.

Sistema Brasileiro de Televisão (SBT) in Brazil, one of the country's biggest broadcasters, has become well-known for its prank videos, says content acquisitions and sales manager Goyo Garcia. They're so valuable to its business that SBT is stocking up its new streamer with several of Novocomedy's kids shows. (+SBT launched in beta for 30,000 users in July. At press time for this issue, a wider rollout was set for August.)

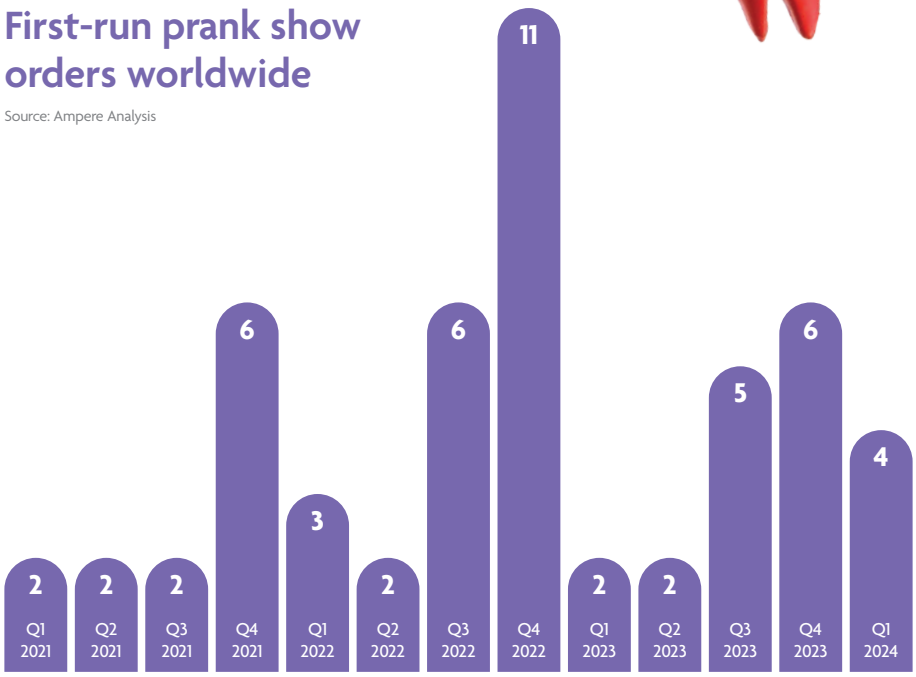
SBT produces its own pranks every week for a Sunday evening slot, and some of them are aimed specifically at kids. These pranks are also shared on the broadcaster's Câmeras Escondidas Programa Silvio Santos (Hidden Cameras Silvio Santos Program) YouTube channel, which currently has more than nine million subscribers.

On YouTube, its videos have collectively racked up hundreds of millions of views. "Panoramic Lift Prank," which was released in 2018, is currently sitting at 28 million. And a new hidden-camera video called "Máquina de Clones" that dropped in June generated more than 700,000 views in its first week.

The broadcaster has also staged pranks based on family films, including one in April for *Ghostbusters: Frozen Empire,* and another based on *The Addams Family* in 2019. And last year, SBT adapted the well-known Brazilian children's fantasy book series Sítio do Picapau Amarelo by Monteiro Lobato into a prank in which two actors play the same character, and kids have to figure out who the impostor is. Adapting the books into a prank gives children a funnier, cuter and more personal way to interact with characters from the iconic property, says Garcia.

## First-run prank show orders worldwide

Source: Ampere Analysis




The value of pranks is that they appeal to kids, but they also provide a strong draw for families, he adds. "Prank shows are an excellent co-viewing opportunity for the whole family [to] sit down and watch together, and this is very valuable for us."

SBT is looking to acquire more younger-skewing prank content, says Garcia, and the broadcaster's formula for success is to respect kids, tap into their imagination and understand their behavior. "If shows can hit this jackpot to get a result that is a mix of entertainment, humor and the 'naive' approach of children, it will surely ring a bell—not just for kids, but for every kind of audience, regardless of age group."

It's early days for the kids prank trend, but France's TF1 is one broadcaster that's beginning to invest in the genre. The network is looking to explore acquiring "fail" content aimed at families (including blooper videos that feature people flopping at whatever they're doing in funny ways). Production companies such as Apartment 11 (*Prank Patrol*) in Canada and pocket.watch in the US are also in the early stages of getting into prank content. Pocket.watch is exploring an original concept in this vein, while Apartment 11 is in talks with a digital-first creator about developing a new prank-focused series.

Raja Masilamani, creative director of London-based Creative Media Partners (*Sinbad & the 7 Galaxies*), is tapping into pranks to add humor to his new 2D-animated series *Mrs. Pea's Lab* (26 x 11 minutes). This bridge concept revolves around a group of young students who play practical jokes on their clueless but well-intentioned science teacher, whose perseverance and determination help her stay one step ahead of the rambunctious kids. Initial designs for the series are done, and Masilamani is working on a bible and sourcing comedy writers. The overall mission of *Mrs. Pea's Lab* is simple: "We want to deliver non-stop gags and fun," says Masilamani, who plans to approach a distributor once he has a first broadcaster on board.

Thinking up creative gags and staying ahead of getting pranked themselves help kids see that creativity, ingenuity and determination are powerful tools worth developing, Masilamani adds. k

Scopely has worked with Mattel on three collabs to date, featuring Hot Wheels, Barbie and Masters of the Universe

# Timely takeovers

Brand owners with vidgame aspirations but tight budgets find that taking over existing games makes better financial sense than starting from scratch.

BY: COLE WATSON

These days, video games represent one of the best-performing entertainment categories, more than holding their own against TV, films and music. But their ascendance in pop-culture status has come at a cost—most of today's market-leading titles have years of development time and millions in financing behind them.

This level of investment simply isn't feasible for the many brand owners looking to create timely growth opportunities in the gaming space for their emerging IPs right now. So it's really not surprising that game takeovers have heated up as quickly as they have in the past year. But before we explore the whys and hows behind this marketing strategy, it's helpful to understand just how lucrative the video game industry has become.

## New game+

Last year, the global gaming market generated more than US$180 billion in revenue, according to a February 2024 report from Amsterdam-based analytics firm Newzoo. And although that represents an increase of less than 1% over 2022, industry-wide consolidation hampered the sector from achieving more growth.

Mobile games accounted for 49% of this total take (US$90.5 billion)—putting them neck and neck with games for home consoles and PCs at US$91.5 billion combined. However, it's important to note the extent of diversification this industry has experienced in recent years. Revenue isn't just coming from one-off purchases of new titles anymore—in-game spending on things like downloadable content (DLC) packs, subscriptions and microtransactions accounted for 43% of all video game revenue in 2023.

For lead Newzoo analyst Tom Wijman, one of greatest takeaways from his company's report is that just 66 titles—many of which have been in the market for more than six years—accounted for 80% of all playtime logged globally last year. These behemoths, including *Fortnite* (8.4%), *Roblox* (5.9%) and *Minecraft* (4.3%), are the prime platforms brand owners should consider for game takeovers because their content is updated regularly and they have built-in fandoms that encompass millions of players.

## Block by block

Celebrating its 15th anniversary this year, Microsoft's flagship sandbox game *Minecraft* has sold more than 300 million copies worldwide since launching in 2010. Showing no signs of slowing down, the game development team at Mojang Studios continues to add new features and DLC on a monthly basis that players can access for free or purchase online through the Minecraft Marketplace.

Mojang first experimented with licensed collaborations in *Minecraft* back in 2012 when it released a first pack of 45 cosmetic skins featuring iconic gaming mascots such as Banjo-Kazooie, 'Splosion Man and *Halo*'s Master Chief. Today, the team works with

some of the world's largest entertainment properties, including Star Wars, Disney theme parks and Jurassic World, to craft much broader and more engaging experiences for the game.

"Licensors appreciate *Minecraft*'s vast audience and unique gameplay, which engages players across all generations, genders and demographics," says Ada Duan, Microsoft's GM of brand, growth and partnerships for the title. "Bringing popular partners into the game is one of the core strategies we use to reach beyond our existing fan-base and bring Minecraft to even more people."

Licensed content can vary greatly depending on the nature of the partnership, notes Duan. For example, Mojang partnered with Hasbro in 2017 to allow players to dress up their avatars as their favorite Mighty Morphin Power Ranger, and then teamed up with the toyco again last year to create a set of NERF-branded weapons and minigames.

Minecraft's most immersive experiences to date are its range of Adventure Maps, each featuring a new explorable world, skins, weapons and enemies based on a licensed property. And one notable collab in this vein was last year's *Teenage Mutant Ninja Turtles: Mutant Mayhem* crossover, which featured a fully recreated version of the Turtles' lair in *Minecraft*'s blocky art style. On top of the added content, Mojang also crafted character quest lines for players to experience, such as training alongside Master Splinter and fighting against baddie Shredder on the rooftops of New York.

"We often time the content releases with pop-culture moments like a movie release or anniversary celebration, or with relevant global topics like sustainability," says Duan. "The *Minecraft* team works with our professional creator partners to make fun and engaging gameplay, while our licensing partners share any themes or elements they would like to feature in the game."

One key to the success of these brand-driven initiatives is leaning on the community of *Minecraft* creators who are fans of the featured IP to help build the experience, says Duan. This helps to ensure that the brand will be authentically treated and respected in the game's development, and these fans/pros often contribute new ideas to make the gameplay and overall experience more engaging.

## New challenger approaching

While *Minecraft*'s long legacy comes with a considerable base of regular players, that doesn't mean there aren't opportunities for brands to shine in competing games. One such title is Scopely's multiplayer party game *Stumble Guys*, which jumped onto the free-to-play scene in 2020.

Heading into its fourth year in the market, *Stumble Guys* has racked up more than 270 million mobile/console downloads and generated upwards of US$80 million in total revenue. And despite the fact that Scopely only started getting into licensed partnerships last year, they've become an important new source of revenue for *Stumble Guys*, which has doubled its lifetime revenue since 2022, says SVP of publishing Eric Wood.

"We wanted to take a unique spin on game collaborations with *Stumble Guys*. For us, it's not just about branded skins and cosmetics," says Wood. "Licensors want players to immerse themselves in their favorite brands, and we can accomplish that by creating custom levels that complement the gameplay."

Last year, Scopely launched more than 10 of these licensed levels, ranging from Barbie Dream Dash and NFL Scramble, to NERF Blaster Base and SpongeBob Block Dash. And it has also just released three

**Paramount and Disney see *Minecraft* as a strong gaming platform for building brand affinity with kids for IPs such as SpongeBob (above) and Mickey Mouse (below)**

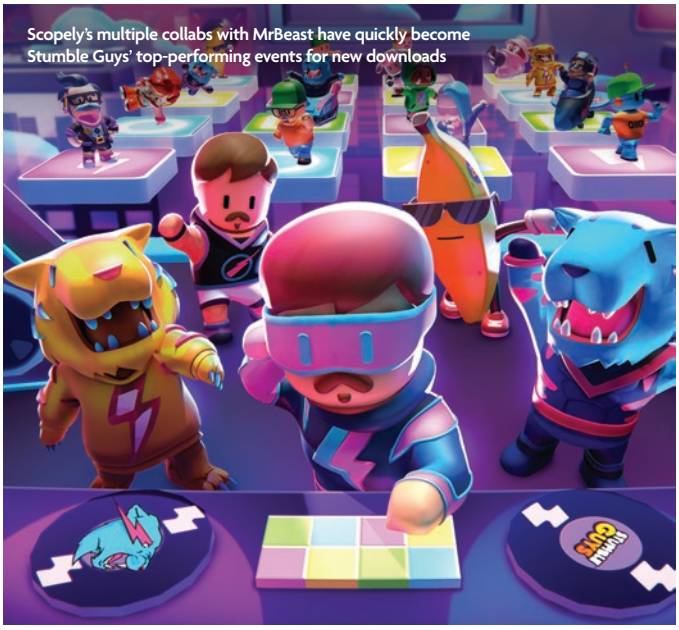
*Stumble Guys* levels in collaboration with YouTube mega-influencer MrBeast that have become its best-performing crossovers to date. Unlike *Minecraft*'s model, Scopely's collabs only run for a limited time, creating immediacy for players to jump on the game.

All of its levels—including the licensed ones—are available to players for free, so *Stumble Guys*' core revenue generator is its monthly season's pass business model. During limited-time events, players can purchase a "Stumble Pass" using 1,200 in-game gems (equivalent to about US$10). This pass lets them unlock 30 tiers of licensed cosmetics such as skins, emotes and character actions through gameplay. And if players don't feel like they can complete all of the tiers in time, they can also purchase levels to upgrade the pass and unlock the rewards they want before the month is up.

Hand in hand with its Stumble Passes, Scopely also runs an in-game vault shop where players can purchase cosmetic items after the event is over if they missed out. (The catch is that only a select few of these will be available at one time, and the purchase price is nearly the same as the season's pass itself.)

The company's best-performing collab to date was last year's activation with YouTube's most-subscribed channel MrBeast, says Wood. The event ran for a month from August to September and adapted sets from the YouTuber's videos into new levels, including a neon disco dance floor, a dangerous traps obstacle course and a race through his warehouse.

According to data from Sensor Tower, this event caused a 600% increase in weekly downloads of the game on the Apple App Store (surpassing more than 70,000 downloads). By comparison, Hasbro's NERF collab sparked a 120% rise in downloads in April, while Ubisoft's Rabbids franchise helped prop up downloads on Apple platforms by 20% in June.


Scopely's multiple collabs with MrBeast have quickly become Stumble Guys' top-performing events for new downloads

LEGO teamed up with Epic Games to build a new edition of *Fortnite* that's safe for kids and families to play together

## Co-op benefits

London-based toyco Toikido took its first steps into gaming last year when it launched Roblox-first IP Piñata Smashlings with game developer Supersocial. It has been played more than two million times in year one, as well as hosting licensed takeovers featuring influencer magician SeanDoesMagic, the UEFA (Union of European Football Associations) Champions League and Cloudco Entertainment's Care Bears.

From the outset, Toikido designed its *Piñata Smashlings* game as a vehicle for collaborations, aiming to build the company's first in-house IP into a 360-degree franchise, says head of marketing Andrew Matjaszek.

"Licensing was always something that we had in mind," explains Matjaszek. "The advent of brand collabs on Roblox is still in its infancy, and it was our thought process that they were the key to building strong brand awareness in this overcrowded marketplace. It's an opportunity to become popular through association with other evergreen brands."

When both parties in a gaming licensing agreement can expand their audiences together, everybody wins, adds Matjaszek. One such example was Toikido's partnership last year with family entertainment chain Chuck E. Cheese, which was keen to engage with Roblox's 70 million daily active users through its first integration.

Supersocial adapted Chuck E. Cheese's characters into Smashlings, as well as developing a new explorable island and adding a range of branded UGC items for players to collect for their avatars. Meanwhile, Chuck E. Cheese ran a three-month in-store Piñata Smashlings campaign across North America that included product sampling, signage, prizes and birthday parties.

And the cherry on top is that 5,000-plus screens in Chuck E. Cheese's fun centers featured *Piñata Smashlings* animated shorts (produced by Nelvana), giving kids and families a first taste of the brand's world and characters in advance of a full TV series that will debut late next year.

"It's never been easier to launch an IP, but it's never been harder to sustain it," says Matjaszek. "We're always looking to work with brands that are engaged with our core audience and have already stood the test of time."

## The LEGO effect

The LEGO Group has a rich history in the gaming market that dates back to the release of its first PC titles in 1995. But the Danish brickmaker made a big new move last year, entering into a multi-year partnership with Epic Games to develop a LEGO version of Epic's free-to-play flagship game *Fortnite*.

The partnership was a perfect fit, since both properties rely on creativity and building as core elements of their respective play patterns, says Remi Marcelli, LEGO's SVP of gaming and metaverse experiences.

*Fortnite* has become famous for its iconic Battle Royale game mode—where hundreds of players shoot it out until there's only one victor left standing—but it wasn't always a fighting game. When Epic first launched the title in 2017, the core experience was all about cooperating with other players to collect resources, build bases and fight to survive against a zombie-like threat. *LEGO Fortnite* is reviving these original game elements for the next generation of players, and giving everything in the world a brick-like texture that's very on-brand.

The ultimate goal of LEGO's long-term collaboration with Epic is to develop fun and safe digital spaces where kids and families can play together, says Marcelli. He adds that LEGO's ongoing research as part of the Responsible Innovation in Technology for Children (RITEC) project has highlighted the importance of creating accessible and valuable gaming experiences. (According to RITEC's phase-two report that was published in April, gaming contributes to childhood development by allowing kids to manage social connections, experience a sense of mastery and have freedom of choice.)

Within two weeks of its December 2023 launch, *LEGO Fortnite* had become the platform's most-played game mode, reaching its all-time daily peak of 2.3 million concurrent users. And it continues to average more than 230 million active users each month, says Marcelli.

Epic has already rolled out several new updates to the core LEGO experience, including the ability for players to tame and recruit animals, create farms for resources, and explore new islands themed around Star Wars and LEGO Ninjago.

"There are many more exciting things still on the agenda, and we are looking forward to what comes next," says Marcelli. K

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Home Chef's Bluey meal kits include character-inspired recipes, packaging activities and collectible toys

# Setting the table

Blue-chip kids brand owners such as BBC Studios and Paramount have earmarked subscription meal kits as a tasty new opportunity to connect with families at dinnertime.

BY: COLE WATSON

Food & beverage products have been a pillar of the kids licensing industry for decades, but the rise of subscription meal kits has led to a category expansion this year. Parents are turning to these services en masse as a way to get fresh, home-cooked meals on the table after a busy workday and avoid fast food.

Made famous by food service companies such as HelloFresh, Blue Apron and Chefs Plate, subscription meal kits take the guesswork out of dinnertime. Boxes arrive every week with pre-portioned ingredients and 30-minute recipe cards so consumers can easily create nutritious home-cooked meals. Last year alone, they generated more than US$12 billion worldwide, and that figure is expected to grow by 4.57% annually until the category reaches US$16.58 billion by 2029, according to research firm Statista.

Smelling a delicious opportunity, kids brands have recently gotten in on the action, identifying family-targeted meal kits as a great way to engage with their audience through a daily routine at home.

## Farm to license

BBC Studios kicked things off in March, signing two deals with UK-based Gousto and Chicago's Home Chef to deliver the first Bluey-branded meal kits. This was Home Chef's first licensing deal since the launch of its family plan program last May, says brand marketing director Raquel Brown.

The activation ran throughout April 2024, featuring Bluey-branded packaging with an activity maze, downloadable coloring pages, an in-bag collectible each week and recipes inspired by the show's characters. Branded meal offerings included Bluey and Bingo's BLT Beef Burgers, Chili's Turkey and Bean Chili and Bandit's Takeaway Pork Egg Roll in a Bowl.

"Compared to our main menu, the family recipes are available in larger portion sizes and designed to be balanced with [children's] palates in mind," says Brown. "Bluey's focus on family and fun perfectly complemented our goal of bringing kids and parents together through cooking. And the fun branding elements allowed customers to enhance their existing mealtime routine."

Post-launch, Home Chef received feedback from parents saying that their picky eaters wanted to try new foods like salmon and vegetables, thanks to a little extra encouragement from Bluey, says Brown. She adds that the first round of licensed kits exceeded expectations and will be a new part of the company's core business moving forward. Currently, Home Chef sells more than three million kits monthly across the US, with consumers choosing from around 35 different meal options each week.

At press time, Home Chef had already followed up this initial foray into licensing with two more agreements—with Mattel for an UNO family game night campaign and with Paramount/Spin Master's PAW Patrol franchise.

The PAW Patrol campaign was modeled after the Bluey blueprint and is the first meal kit partnership for Paramount's consumer products and experiences division, whose retail development team had the collaboration underway for well over a year as it looked for new ways to reach out to families, says EVP Jamie Drew. These kits launched in August as part of Paramount's PAW Patrol "To The Rescue" program, designed to help parents and preschoolers achieve new milestones together throughout the year.

"We know from research that today's preschool parents are turning to entertainment brands to tackle parenting challenges and celebrate their kids' achievements," says Drew. "Meal kits check so many boxes for us because they are healthy food options for kids, they provide helpful solutions for parents, and they enable families to connect with each other and our franchises in a unique way."

## Easy brand oven

In addition to traditional meal kits, entrepreneurs have been cooking up STEM-focused baking kits to help kids ages four and up develop new skills, including measurements and chemistry. One such innovator is Texas-based I'm The Chef Too!, which delivers more than 750,000 baking kits worldwide each year.

CEO Lisa Wallace founded the company with her husband in 2019 when they decided to adapt their regional after-school and summer-camp baking programs into kits they could ship out nationwide during the pandemic.

Since its humble beginnings in Wallace's basement, this venture has migrated into a 30,000-square-foot factory. And after four years in business, the next step to scale I'm The Chef Too!'s operations was to explore licensing opportunities.

The company began building connections with brand owners through promotional partnerships and movie premieres it was using to introduce its products to new audiences. Eventually, Wallace got her foot in the door at Hasbro in 2023 and secured a first licensing deal to produce Transformers, My Little Pony, Peppa Pig, Candy Land and PJ Masks baking kits.

"When we take on a licensing opportunity and release a new product, we actually don't bundle it into our subscription line," explains Wallace. "The core interests vary greatly in our four- to 14-year-old target demographic, and we don't want to force anyone into a subscription. Instead, we offer the licensed kits as add-ons for a limited time so consumers know exactly what they're getting."

In the case of Hasbro, I'm The Chef Too!'s product development team initially focused on crafting recipes themed around its kids brands' core characters for six months. This resulted in several kits that are still available year-round for US$30, including Transformers Treat Pops, Peppa's Muddy Puddle Cookie Pies and My Little Pony Parfaits.

Each package comes with an activity/recipe guide, pre-measured dry ingredients and a wide range of specialty supplies, such as edible character wafer paper and branded candy wrappers.

Following this first partnership, I'm the Chef Too! signed a similar agreement with Mattel in February to produce a Barbie-themed collection of kits (cookies, popsicles and mousse), and it will also debut a new range of Elf on the Shelf kits with The Lumistella Company in Q4 this year.

While I'm the Chef Too! is primed to take on more licenses, the company's long-term goals are to expand outside North America and explore partnerships with retailers to carry its kits in brick-and-mortar stores, instead of relying on e-commerce to drive new business, says Wallace.

And the company is committed to working directly with I'm the Chef Too!'s loyal community during the development process to mine new product ideas and leverage its social media presence during launches, she adds.

"I think the biggest trend in the category today is focusing on the voice of the customer, because they're the ones who grow the business for you. Each one is a micro/macro influencer on social media who is showcasing your product to the world. And by rewarding them through a loyalty or ambassador program, they become motivated to continue sharing your new products—in fact, they quickly become the most valuable part of your marketing channel." k

Some popular meal kit companies that have yet to sign a licensing deal with kids brand owners.

**HelloFresh**
**DISTRIBUTION:** North America
**MONTHLY SUBSCRIBERS:** 6.64 million (as of December 2023)

**Mindful Chef**
**DISTRIBUTION:** UK
**TOTAL KITS SOLD:** 30 million-plus

**Blue Apron**
**DISTRIBUTION:** US
**MONTHLY SUBSCRIBERS:** 267,000 (as of June 2023)

**Chefs Plate**
**DISTRIBUTION:** Canada
**OWNED BY:** HelloFresh Group (acquired in 2018)

# Dream world

Kidcos are moving en masse into American Dream Meadowlands mall to build brand affinity and expand their location-based entertainment offerings.

BY: COLE WATSON

Hasbro's strategy with The Gameroom in American Dream Mall was to appeal to a wide audience by leveraging as many brands as possible

Canada's Triple Five Group—one of the largest shopping center operators worldwide, and best known for opening The Mall of America and the West Edmonton Mall—has got a brand-new bag. The company is focusing most of its current resources on the American Dream Meadowlands mall in New Jersey, signing leases with several large kids brands to make it a premier shopping destination for families.

Triple Five opened American Dream's doors in 2019, but its momentum out of the gate stalled when the pandemic reared its ugly head. When it reopened after a seven-month closure in 2020, the mall had still only filled 80% of its total occupancy. And that's where companies with kids brands in their portfolios have found an opportunity to put down experiential roots and develop new fans.

The mall spans more than three million square feet of retail space, with a nearly equal mix of retailers (45%) and entertainment facilities (55%). Its featured tenants include Toys "R" Us (flagship store, train ride), Nickelodeon (theme park), DreamWorks Animation (indoor water park), The LEGO Group (family entertainment center), Rovio (mini golf) and Bandai Namco (collectibles store).

Hasbro launched The Gameroom, a first-of-its kind entertainment center, in American Dream this past July. The build was an intense journey, according to location-based entertainment VP Matt Proulx, taking nearly 10 years to complete as the partners dealt with a plague of construction delays.

Despite these challenges, Proulx always believed in the potential of the project and Hasbro's stacked portfolio of brands to attract both local families and the 60 million tourists who make their way to nearby New York state each year.

"When you look at malls today, the ones that are really thriving right now are those that have a healthy balance of great dining, unique entertainment options and a well-thought-out shopping experience," he says. "We wanted to combine all of those elements together in The Gameroom because we see a deep demand from families and friend groups for shared experiences."

This Hasbro destination spans 41,500 square feet and boasts a Candy Land Shake Bar featuring photogenic drinks, a G.I. Joe laser tag arena, Monopoly roller games and a prize room stocked with a wide range of the company's toys and licensed products. Hasbro's core strategy with this project was to leverage as many brands as possible to ensure the experience appealed to a wide multi-generational audience, notes Proulx.

"Our objective here is to retain or build up more brand affinity," he says. "It also gives us a space to showcase our upcoming entertainment and product offerings to our core audience, who become some of our most valuable brand ambassadors."

Sesame Workshop was looking to accomplish similar goals when it announced in June that it was installing its first-ever Sesame Street Learn & Play Center in American Dream. The 13,000-square-foot educational exhibit will launch in Q4, allowing kids to learn about rainforests with Elmo, visit Abby Cadabby's magical garden, role-play at Hooper's Store and participate in an arts & crafts fair.

To help bring the center to life, Sesame leveraged Triple Five's theming and design teams to maximize its venue space and incorporate as many interactive elements as possible. Meanwhile, the organization also used its first-party education and research divisions to build curricula into the activities and ensure the brand was represented throughout the experience.

SVP of global strategic partnerships and themed entertainment Jennifer Ahearn recognizes that experiential installations in retail outlets are a critical tool for expanding a brand's LBE business in today's market. "We know that kids who experience our Sesame Street-themed attractions engage even more with our content, which drives them to achieve new learning outcomes."

While this retail concept will make its debut at American Dream, it's only the beginning of Sesame's partnership with Triple Five, says Ahearn. She's aiming to shop the Learn & Play centers to American Dream's sister malls, and is also on the hunt for more retail partnerships outside the US. k

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# Shaping Generation Beta

Exploring the evolving parenting styles of Millennials and Gen Z.

BY: ASHLEY FELL

As we stand at the threshold of welcoming Generation Beta into the world, it's worth contemplating the influence that parenting will exert on shaping their future. While it may be premature to define this next generation's characteristics, understanding the values and behaviors of their prospective parents—primarily younger Millennials and older Gen Zs—offers some intriguing insights into what might lie ahead.

Generation Alpha describes those born between 2010 and 2024, which means that the cohort following them will be Generation Beta, born between 2025 and 2039. By the middle of the 2030s, we anticipate that Generation Beta will make up 16% of the global population. Incredibly, many Gen Betas will live to see and work in the 22nd century.

The following insights are based on a nationally representative survey (by gender, age and state) of 2,004 Australians conducted by McCrindle this year between May 30 and June 4. We filtered out those respondents with children under the age of 18, leaving a sample of 738 parents.

## Trends in parenting styles set to shape Gen Beta

The Gen Z demo is redefining parenthood in ways that depart from the norms of previous generations.

Unlike their predecessors, who were often characterized by a balance of structured parenting and a focus on achievement, this new generation of parents is exhibiting a more nuanced approach in the following ways.

### 1. Adaptability in parenting tools

While both Millennial and Gen Z parents are aiming to raise well-rounded, empathetic children, their approaches reflect their unique generational values and experiences.

Millennial parents lean on their extensive knowledge of child development and technology, encouraging open communication. Meanwhile, we're seeing a cohort of Gen Z parents that prioritize balancing family life and holistic well-being, ensuring their children grow up in a supportive and nurturing environment.

One notable trend among this new wave of Gen Z parents is a preference for flexibility and adaptability in the parenting tools they use. They will be more inclined to switch between an out-sourcing approach and a hands-on one, as needed. For example, we are seeing increases in the number of parents engaging in childcare (outsourcing) and also homeschooling (hands-on).

This adaptability stems from their own upbringing in a rapidly changing world, where they witnessed the evolution of technology and societal norms firsthand. These evolving parenting approaches highlight the diversity within generational cohorts, and also promise a rich and varied upbringing for Generation Beta.

### 2. Emphasis on individuality and emotional intelligence

Another hallmark of Gen Z (and therefore their parenting as well) is a heightened emphasis on fostering individuality and emotional intelligence. We can expect this new generation of parents to prioritize open communication, empathy and self-expression, encouraging their children to explore their emotions freely. This contrasts with a slightly more structured and directive approach that's often associated with older Millennial parents.

| GEN BETA | GEN ALPHA | GEN Z | GEN Y | GEN X | BOOMERS | BUILDERS |
|---|---|---|---|---|---|---|
| 2025-2039 | 2010-2024 | 1995-2009 | 1980-1994 | 1965-1979 | 1946-1964 | 1925-1945 |
| 0% 16% | 23% 23% | 23% 20% | 21% 19% | 17% 14% | 13% 7% | 3% 1% |

Percentage of current population  Percentage of population in 2035

Source: McCrindle

Gen Z has grown up with the rise of social media and increased awareness of mental health issues, so these parents place a strong emphasis on emotional intelligence and communication. As a result, we expect that they will actively create spaces for their children to express their emotions and develop coping mechanisms for the challenges they might face.

Gen Z parents (40%) are more likely than older Millennial parents (32%) to say they always consider their child's preferences when they make plans for the family. Their children are more often viewed as little people to be understood and guided, rather than "blank slates" to be prescribed and directed.

As parents, they are likely to integrate more holistic and balanced approaches to family life, ensuring that their children not only have the tools to express their emotions, but also understand the importance of maintaining overall well-being. This could involve more family activities, shared responsibilities or a focus on creating a nurturing home environment.

### 3. Acknowledging technology as a double-edged sword

Technology plays a dual role in modern-day parenting. On one hand, we have seen parents—notably Millennial parents—leverage tech as a tool for education, connection and entertainment, integrating it seamlessly into their children's lives from a young age.

On the other hand, there is also a cautious awareness of the potential pitfalls of technology, prompting parents to balance screen time with outdoor activities and interpersonal interactions.

When reflecting on the context that shaped Millennials, we'd do well to note that they were the first generation to fully experience social media as parents—right when many Millennials became parents, social media began to explode, whereas it has impacted Gen Z differently because they used social media throughout their formative years.

We know more about social media now that we've had it for a decade and a half (basically, all of Gen Alpha's life span so far). While many Millennial parents used social media to document their children's lives, Gen Z parents know more about both the benefits and challenges that come with social media use from a young age. They're more likely to strongly agree that limiting their child's screen time is a high priority for them (36% of Gen Z parents, compared to 30% of older Millennial parents). As the most technologically savvy generation thus far, Gen Z parents see the benefits of technology and screen time, but they also see the downsides and are pushing back on usage and the age at which their children can access and engage with it.

## Prognosticating Generation Beta

As we prepare to welcome Generation Beta, understanding the evolving parenting landscape of Millennials and Gen Z provides a valuable glimpse into the future. Gen Z parents are well-positioned to raise children who are empathetic, holistic and have a well-rounded understanding of the global and diverse society they live in.

While the specific traits of Generation Beta remain speculative, the influence of their parents' values, behaviors and attitudes promises to be profound and transformative.

The times, technological advances and social events that we live through shape us all, but are more defining for those experiencing them in their formative years. As Gen Beta arrives, we will watch these technologies and social events closely to see what will shape this 21st-century generation as they age and as they gain autonomy and influence.

We anticipate that Gen Beta will be an adaptable, tech-savvy and socially conscious cohort, equipped with strong emotional resilience and a deep-seated value for individuality. Betas may navigate a world where rapid technological advancements and global connectivity are the norm, guided by parents who prioritize adaptability and emotional well-being. k

**ASHLEY FELL** is director of advisory at McCrindle, a social research agency that tracks and researches generational trends. For more information, visit mccrindle.com.

# Nurturing something new

Tech entrepreneur Roger Egan is looking to fill a market gap with his latest build—and he needs kids entertainment brand partners to get it to market.

BY: RYAN TUCHOW

Nurture is a new app that blends active TV watching, gaming and education—and the fledgling Washington-based edtech company behind it is keen to fire it up with bespoke content featuring characters and shows that kids already love.

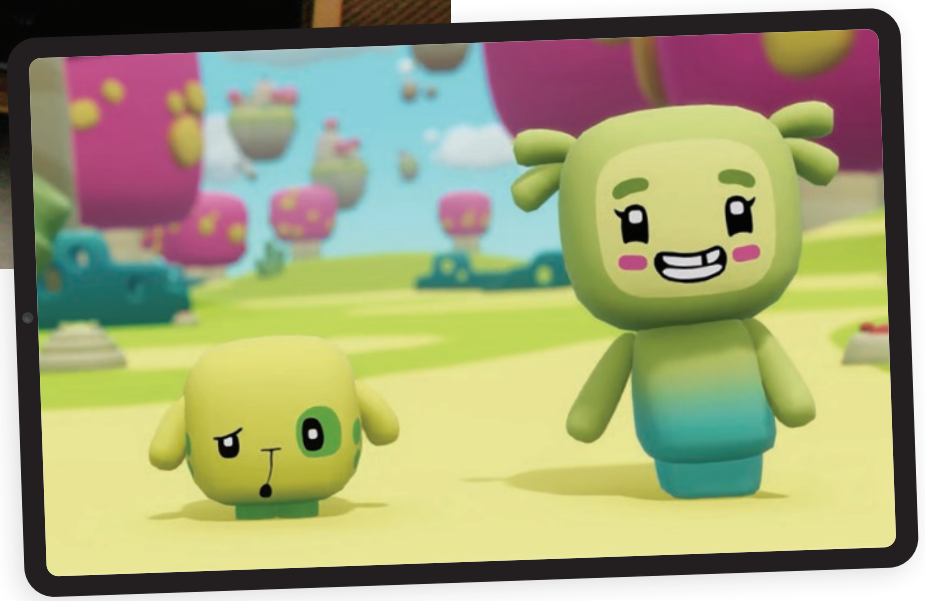
Serial entrepreneur Roger Egan started conceptualizing the Nurture app—which is initially aimed at kids ages four to seven—during COVID, when his sons (who were five and nine at the time) had to learn from home. Realizing that his kids weren't building fundamental life skills, including critical thinking and creativity, he identified an opportunity for a platform that provides a more personalized learning experience, where TV viewing transitions seamlessly into playing games on a phone or tablet.

How it works in practice is that kids start off watching short animated videos on their TVs. Then as part of the narrative, characters break the fourth wall to "call" a friend, reaching out to viewers on their mobile devices for help with challenges. Kids can complete these fun tasks—which range from puzzles and navigation games, to mindfulness exercises—by themselves or with a friend of their own.

A core part of Nurture's go-to-market strategy is to license third-party characters and brands. The company is actively looking for partners and has had conversations with companies including WildBrain, Nelvana, Cyber Group Studios and Blue Zoo.

Each IP will get its own exclusive area on the platform where kids can watch videos and play games featuring the brand's characters, instead of all the content being lumped together. Nurture says it will initially collaborate with brand partners but produce

A core part of Nurture's early strategy is to license third-party characters and brands.



**Kids start out watching Nurture shows on their TV, and then the animated characters invite them to play games, solve puzzles and even do meditation exercises**

all of the original animation itself to ensure that the content fits the platform's look, feel and curriculum.

Interestingly, Egan's career is not in kids content or animation. He was an investment banker before he started the Singapore-based online grocery business RedMart, which was acquired by Alibaba in 2016. So as he set about building Nurture, he quickly recruited husband-and-wife duo Julie and Scott Stewart—creatives whose careers are squarely rooted in the kids media industry—as co-founders and co-chief creative officers.

The Stewarts' previous credits include co-creating animated series *Rev & Roll* (Family Jr.) and *Kate & Mim-Mim* (Disney Jr. and CBeebies). And for the Nurture launch, they have created a new original series called *Doki's Delivery*, which is about getting packages where they need to go.

Nurture has also tapped a handful of advisors—including Club Penguin co-founder Lance Priebe and Barbara Coloroso, author of several best-selling books about child development—to help build its educational framework.

Egan's strategy and early talent partnerships attracted angel investors and venture capital firms like California's Reach Capital and London-based Seedcamp, which have pumped around US$2.8 million into the venture (with Nurture's founders also putting in some of their own money).

The company has been testing Nurture for about a year now, rolling it out in phases. It's free at the moment in order to gather feedback, but will eventually introduce à la carte pricing for different levels of access.

Egan sees Nurture as a channel that's aiming to grow with its partner brands and series, while positioning itself as a trusted source for age-appropriate, learning-focused content. The goal isn't to try and compete with studios that can create a large volume of content, but instead to make a handful of games with high levels of replayability, he says.

"It's *Dora* or *Blue's Clues* on steroids," says Julie Stewart. "It's a new way of consuming media and learning, and companies [we've talked to] are excited to extend their brands and have their characters engage [with kids] in a more meaningful way."

Nurture's launch also stands to benefit from several broader parenting trends that are at play in the market, including a desire for guilt-free screen time and more games that families can play together, adds Egan.

Another factor is that Nuture's approach fits naturally into the time kids are already spending on gaming. In the US, more than 90% of kids ages three and up play video games, and eight- to 17-year-olds do so for an average of 1.5 to two hours every day, according to the American Academy of Pediatrics.

Nurture's current strategy is focused on building an audience, but longer term, the plan is to explore opportunities to license its tech and pipeline so companies can create interactive content for the platform themselves, says Egan. This will help keep a steady flow of new content coming onto the service.

As it takes off, the platform may also age up to reach an older audience in the seven-to-nine age range. The overall mission is to create autonomous, life-long learners. "We hope [viewers] subscribe to Nurture and never leave," says Egan.

Kids content creators and producers interested in working with Nurture can contact Julie Stewart at julie@nurture.is.

The studios won't pitch anything created with generative AI tools—a principle that helped guide the launch of preschool series *Dee & Friends in Oz*

# Setting the standard

9 Story Media Group/Brown Bag Films' AI policy could serve as a starting point for an industry-wide conversation around the tech.

BY: RYAN TUCHOW

9 Story Media Group and Brown Bag Films have drafted a new policy that outlines how the company will use—and, perhaps more importantly, not use—generative AI in development and production. And it might serve as a useful precedent for the whole industry.

Now owned by Scholastic, 9 Story and Brown Bag say they will not pitch anything (including text and art) that has been created using generative AI tools. And prospective partners should note that the company now asks that materials pitched to them not include anything originated by tools such as Midjourney, DALL-E and ChatGPT.

If companies do send pitches with such assets, they need to disclose it, and that information will be shared with clients, staff and contributors in advance. Third-party contractors should also not use generative AI unless they get approval from the company.

To make sure it's approaching AI in a way that balances its cost- and time-saving value with the tech's potential ethics issues, 9 Story and Brown Bag have set up an internal AI council to oversee its use. This small group of artists, technicians and legal execs will guide the policy through regular reviews, and the plan is to update it every six to 12 months. Some of the use-cases the group is likely to examine first include voice-overs, predictive budgeting, chatbots, animation clean-up and lip syncing, says Cathal Gaffney, Brown Bag's managing director and COO of 9 Story.

Staffers and clients have voiced their concerns over AI hurting quality, challenging copyrights and costing jobs—all legitimate concerns. But Gaffney is pragmatic, saying that AI is here to stay and companies will only be using it more in the coming months and years. So he'd like to see every studio, broadcaster and funding agency start drafting their own policies—and he'd be happy if Brown Bag's approach proved to be a useful starting point.

Gaffney adds that while there has been a lot of conversation about AI usage among producers—particularly in animation circles—it's especially critical that broadcasters, as the industry's gatekeepers, set clear standards and policies about what they will accept in content they're considering for commission or acquisition.

The role AI plays at 9 Story/Brown Bag is sure to change substantially over time, says Gaffney. "As the tech develops, we could train it on our own IPs and use that to develop more content. [AI] is an industry conversation we all need to be having, and a topic we need to get a handle on quickly."

The full policy is available on Brown Bag Films' website (brownbagfilms.com). k

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# GAME TIME

The most decorated gymnast in history, Simone Biles, once said: **"I'd rather regret the risks that didn't work out than the chances I didn't take at all."**

Or in the immortal words of Nike, **"Just Do It."**

These can-do mantras seem like they could have inspired some of the groundbreaking experiments that are at the heart of a growing sports content trend for kids.

And at a time when many businesses are having trouble even getting projects off the bench, this may just be the hook it takes to win the game.

## IN THIS SPECIAL REPORT


01 WHY STREAMERS LIKE NETFLIX AND AMAZON ARE DOUBLING DOWN ON LIVE SPORTS RIGHTS

02 NEW RESEARCH FROM WE ARE FAMILY IN THE UK DELIVERS KEY INSIGHTS ABOUT HOW KIDS CONSUME SPORTS CONTENT

03 A DEEP DIVE INTO BIG LEAGUE INITIATIVES TO DEVELOP A NEW GENERATION OF FANS THROUGH ENTERTAINMENT

04 HIGHLIGHTING SOME OF THE HOTTEST NEW ATHLETIC SHOWS IN DEVELOPMENT FOR YOUNGER AUDIENCES

# SPORTS ON DEMAND

## Streaming platforms are looking to attract young eyeballs by serving up more family-friendly entertainment with live sports and adjacent docuseries.

BY: MARK DILLON

IN the aftermath of a game that featured plenty of cutaways to Taylor Swift in the friends and family box—before going into a tie-breaking overtime for just the second time in league history—it was reported that Super Bowl LVIII coverage on CBS and Paramount+ reached a total of 210 million viewers in the US, plus an international audience of 62.5 million in more than 130 markets. In fact, it was the most-watched TV event of all time, and the most-streamed Super Bowl ever, according to Nielsen.

With these kinds of audience numbers at stake—and the unique ability of live sports to bring whole families together to watch big games and events—it's no wonder that most SVOD platforms have zeroed in on the genre as a major weapon when it comes to combating churn and winning the streaming wars. But where do things currently stand with those rights?

Disney+, which reportedly counts half of all US families with young children as subscribers, announced earlier this year that it would be rolling ESPN content—including live sports—into its domestic offering. (The Walt Disney Company has an 80% ownership stake in ESPN.)

Netflix recently scored a touchdown with the announcement that it will be the global home of two National Football League games on December 25—one featuring the Super Bowl champion Kansas City Chiefs versus the Pittsburgh Steelers. Plus, the platform will stream at least one Christmas Day game in each of the following two seasons.

The NFL has also made deals with multiple digital services, including Amazon Prime Video, which is paying a reported US$1 billion per year to be the exclusive broadcaster of *Thursday Night Football* (starting last season).

For its part, the NBA recently signed an 11-year global media rights agreement with Prime, which will present exclusive global coverage of 66 regular-season NBA games beginning in 2025, including an opening week doubleheader, a new Black Friday NBA game and all games from the knockout rounds of the Emirates NBA Cup.

Prime also scooped up the rights to soccer leagues and competitions in Brazil, the UK and Europe, in addition to French Open tennis. And Amazon has partnered with rights holder Rogers Communications to exclusively bring Monday night National Hockey League games to Canadian fans for the next two seasons—the NHL's first such agreement with a digital-only service.

The drive to stream sports is so strong that it has even turned opponents into teammates. In February, ESPN, Warner Bros. Discovery and Fox announced a joint US service slated to launch this fall featuring content from all major professional and college leagues.

### IN LEAGUE TOGETHER

The truth is, streamers and sports leagues need each other right now. Live sports is a key area where linear broadcasters have historically had streamers beat, but streamers want sports because they want families.

"Sports offer advertisers a reliable audience watching brand-safe content, regardless of what platform games air on," writes business reporter Jacob Feldman on the *Sportico* website. "And tech companies are increasingly in the ad business." Prime and Netflix have both introduced ad-supported tiers (with Apple's said to be in the works), and each platform is reportedly using sports properties to court advertisers.

To continually enlist young fans and ensure long-term growth, the leagues need to go where kids are—and that's not on broadcast TV channels anymore.

Last year, Nielsen reported that two- to 11-year-olds spent 62% of their screen time over summer break streaming and 30% on "other" platforms, primarily gaming. For 12- to 17-year-olds, the breakdown was 43% and 46%. By comparison, broadcast viewing accounted for just 20.8% of total TV time—a new low. Cable usage inched up 0.4% thanks to feature films (up 10%) and news (up 6.6%), but lost 0.6 share points due to the increase in total TV usage.

(For more on what sports leagues are doing to engage their next generation of fans, read "In a league of their own" on page 56.)

## STREAMERS CATERING TO KIDS

The symbiotic relationship between streamers and sports leagues extends much further than game rights—with most streamers now investing in unscripted sports programming, too.

Netflix has established a strong relationship with the NFL, starting with 2023 docuseries *Quarterback* (which generated 21 million hours of watch time), and followed by *Receiver*, which premiered in July and was the streamer's most-watched program for a time. (According to sponsorship insights group SponsorPulse, 69% of engaged NFL fans have kids in their households.)

And these football-oriented shows came on the heels of 2023's *Break Point* (tennis) and *Full Swing* (golf)—which racked up 53 million hours of watch time in its first four months.

But car racing is the sport that really propelled Netflix down this path. The streamer's *Formula 1: Drive to Survive*, which has chronicled F1 drivers and races for six seasons, is a special case. It inspired a 2.3% viewership bump for live races in 2022, according to Nielsen, and logged 90 million watch-time hours in the first half of 2023.

Disney+ already has a robust catalogue of scripted sports fare, including basketball-themed series *The Crossover* and feature film *Chang Can Dunk*. The platform also offers docuseries including *Save Our Squad with David Beckham* and *Matildas: The World at Our Feet*, which follows the Australian women's national soccer team.

And more players are getting into the game. For example, Sony Pictures Television is tapping into sports through a new partnership with City Football Group (CFG), the owner of the Manchester City soccer team, to co-develop and produce original kids TV projects. The companies teamed up in late July with the goal of creating animated projects and children's series that have soccer, or CFG's clubs and players, as the focus.

Sony and CFG will jointly generate concepts and fund the development of projects that could also include documentaries, as well as unscripted and scripted series. It's too early for the companies to share specific details, but when it comes to animation, the focus is on content aimed at preschoolers and the six-and-up demo.

Manchester City appeared in Amazon's documentary series *All or Nothing* in 2018, and CFG's City Studios banner produced the Netflix docuseries *Together: Treble Winners*, which premiered in April.

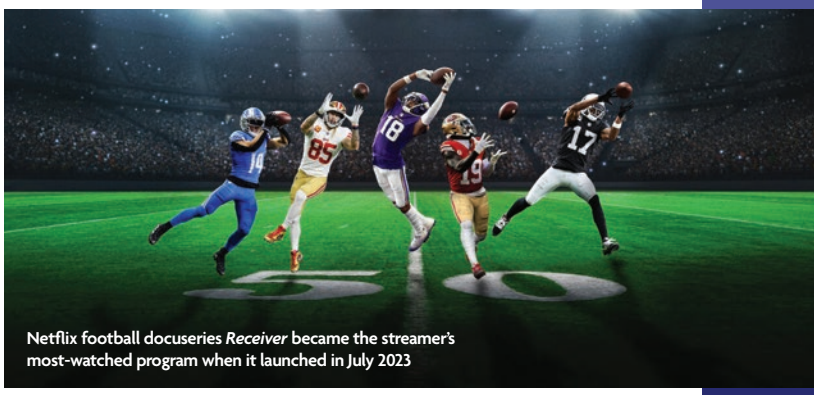
(See "Taking the field" on page 59 to discover more new sports-centric series in development for kids.)

## GET IN THE GAME

The major leagues are also looking beyond television, seeking brand engagement with potential younger fans through video games and eSports. The NBA co-runs the NBA 2K League, for example, which live-streams its eSports games on Twitch and YouTube. And the NHL, MLB and NFL are also involved in eSports championships series.

Then there are the social media platforms—led by YouTube, TikTok and Instagram—where US teens spend 4.8 hours per day on average, according to Statista.

When it comes to tailoring social and web content to this demographic, it's the NBA that's got the most game. For its 2022/2023 season, the NBA reported 18 billion views across its social platforms—the most of all sports leagues—with 50% of its audience in the 25-and-under bracket. And most of its social media growth has been international, since 70% of its followers live outside the US.



**Netflix football docuseries *Receiver* became the streamer's most-watched program when it launched in July 2023**

**Amazon Prime Video announced in June that it will broadcast *NHL Prime Monday Night Hockey* and game highlights showcase *NHL Coast to Coast* in Canada**

For example, when Suga, a member of South Korean boy band BTS, was named an NBA Ambassador, the announcement generated the league's second most-liked Instagram post of all time. And the league is also thinking of younger children, offering a Jr. NBA website with downloadable activities.

When it comes to streamers and sports, it's obvious that it's very much game on. But with so much at stake for platforms, rights holders and leagues, the only question remaining is: What's the winning combo? k

# WHAT'S THE SCORE?

## Research shows a strong connection between kids and sports—but can that translate into an audience for kids sports content?

BY: MAURICE WHEELER

The value of sports in a child's life is well documented, from teaching crucial life skills such as teamwork, self-control, discipline and leadership, to improving physical and mental health. And these benefits aren't derived just from physically getting in the game, either. Children who watch sports content tend to be better at dealing with loss, have higher levels of perseverance, and are more proficient at math.

There's a very clear correlation between children who watch sports content and those who participate, according to research that We Are Family conducted at the end of 2023 with more than 4,300 kids ages eight to 12 around the world. Furthermore, this study shows that sports participation and content consumption feed into each other—children watch their favorite sports content, get inspired to participate, fall in love with the sport, and then seek out more content.

With that in mind, one could argue that creating sports content for children is almost a moral obligation. And it's not like we're forcing kids to eat their broccoli—sport is the perfect storytelling vehicle, rich with rivalries, competition, athletes' journeys, struggles, jeopardy, rewards, surprises and emotions.

When we asked kids how they like to engage in fandom for a team or athlete, "watching content" was the number-one answer. In fact, 85% of the young sports aficionados we spoke to watch sports content weekly, and 23% do so daily.

**51% OF TWEENS**
regularly watch games/competitions either live or on TV

So why don't we see kids TV producers making reams and reams of kids content focused on sports, in the same way that we see it happening in the adult-focused general entertainment market? Sure, there are a few exceptions, but sports content aimed at children is conspicuous in its absence. The reasons for this are threefold.

### 01 THE MONEY FACTOR

Follow the money and it's evident that current sports sponsorships are not geared towards attracting younger audiences. From gambling companies to cryptocurrency firms, the focus is squarely on the 18- to 34-year-old demo. And to make matters worse, clubs sponsored by gambling firms must actively avoid engaging with children across the EU, the US and most major global economies. The truth is, the financial gain of sports content aimed at kids is limited.

### 02 DECLINING INTEREST IN LIVE SPORTS

Live sporting events are the heart of sports content. They are the focus of so much attention that broadcasters (and now streamers) will pay billions of dollars for these rights—and kids just aren't watching live sports. Our survey revealed that only 51% "regularly watch games/competitions with the team, either live or on TV." While access to live sports can be an issue, particularly for kids from lower-income families, only 13% of those who don't watch live sports cited this as the barrier.

The truth is, live sports just don't do it for kids. They are used to much shorter content lengths, and they can get a well-edited highlight reel on social within minutes of the final whistle. They are just not programmed to sit down and watch two or more hours of content at a specific moment in time.

### 03 PREFERENCE FOR PERIPHERAL CONTENT

Kids today consume sports content differently. They gravitate towards YouTube personalities like the Sidemen and Dude Perfect (YouTube is kids' favorite platform to consume sports content on), TikTok clips and Instagram stories from their favorite athletes, as well as gaming platforms like Roblox and console/mobile games. Even podcasts have found their niche among young sports enthusiasts.

Traditional broadcasters are struggling to adapt to this fragmented and dynamic landscape, with their eyes still focused on the live sports experience (that they paid billions for...). They just aren't thinking about all of these new types of sports content that are more appealing to kids.

**85% OF TWEENS**
Watch sports content weekly

**23% OF TWEENS**
Watch sports content daily

To bridge this gap and foster a new generation of sports enthusiasts, there are several opportunities that are ripe for content creators, producers, broadcasters and rights owners to take advantage of.

## 01 FIX THE LIVE EXPERIENCE

While the live sports 'horse' has already bolted for many kids, there is still a chance to get some of them back into the fold. To begin with, leveraging new technologies such as augmented reality (AR) can create immersive and interactive sports experiences.

And bringing in influencers and social commentators to add their own take on the live games can add a sense of relatability. Reaction videos are a mainstay of social content, and this format can easily be applied to live sports.

With 42% of US kids already watching eSports streams, it's also about taking the live experience to where they are. Running a live game in Roblox, Fortnite or even in EA Sports FC (the new name of the FIFA game series) could potentially tap into the popularity of eSports.

And finally, while access wasn't the biggest barrier, it still accounts for why one in eight kids don't watch live sports. It's important for sports governing bodies to look beyond the immediate live rights revenue they might get from selling into walled-garden content providers and focus on getting their sport in front of as many future fans as possible.

In the long run, the value of engaging kids and cultivating the next generation of fans will be worth the short-term revenue loss. From cricket to swimming to Formula 1, we are seeing more athletic associations recognizing the value of free-to-air partners.

## 02 GIVE SMALLER SPORTS A CHANCE

There are many sports that have the potential to gain a foothold with kids through exposure. Shining a spotlight on lesser-known sports and finding a cost-effective way to air them would be great for sports in general.

This is also an opportunity to balance out the inequality between men's and women's sports. Many media pundits will say that women's sports don't draw enough viewers to justify the broadcast spend. But as exposure breeds fandom, it becomes a Catch-22. We have seen from what is happening in the US with the WNBA and women's soccer that you can build an audience if you're brave enough to stay the course and invest in a sport long term.

## 03 PERIPHERAL CONTENT IS THE NEW CORE

We know that the more channels kids can exhibit fandom on, the deeper and stronger that fandom becomes. On average, children engage with sports across 4.7 different channels, and grazing on the content that spins off of the live experience will form the majority of a child's sports consumption. The sort of content they enjoy is also extremely varied, from official content to unofficial fan-driven stuff.

The live sports moment will always exist, but the focus should be all about what content you can create in the build-up and aftermath. Looking at what sports like MMA and boxing are doing at the moment, and the increase in their popularity among children, is strong evidence to suggest that it can be done—and other sports should be taking a page from their playbooks.

**MAURICE WHEELER** is CEO of We Are Family UK, the world's largest full-service agency group that specializes in children, young people and their families. He has been on the front line of developing audience-led strategies for more than 20 years.

# IN A LEAGUE OF THEIR OWN

## From family-friendly alternate telecasts to immersive Roblox experiences, pro sports orgs like the NFL, the NHL and Formula One are breaking new ground in customized content for kids.

BY: JEREMY DICKSON

Like fine-tuned athletes pushing the boundaries of what's possible in competition, pro sports leagues are flexing their innovation muscles to meet their youngest fans on the platforms they love, catering to changing at-home viewing behavior and diversifying to build next-gen engagement.

In the last two years alone, the National Football League, National Hockey League and motorsport circuit Formula One collectively delivered 12 alternate telecasts geared towards kids, families and multi-platform viewing. And this is likely just the tip of the iceberg, with more new projects percolating in the production pipeline.

Multiple factors have converged to accelerate this new content trend: increased fragmentation of media consumption due to the massive growth of streaming and social media platforms; greater demand for immersive, family-friendly live sports programs; advancements in real-time animation and player-tracking technology; and sports organizations' ever-present need to boost loyalty by introducing their brands to a new generation of young fans.

Formula One's popularity has grown exponentially since 2018, and this racing class now has a huge audience on YouTube and TikTok

For its part, the NFL had plenty of incentive to charge into the alternate kids telecast business—American football ranks as the favorite sport for US kids ages 12 and up to watch, according to a 2023 SSRS Sports Poll.

The league got in on the ground floor back in 2021 when it partnered with Nickelodeon and CBS Sports on its first kid-focused alternate live telecast, *NFL Wild Card Game on Nickelodeon*. The Nick-ified spin on the game featured custom on-field visual effects inspired by iconic characters from *SpongeBob SquarePants* and *The Loud House*, along with slime cannons firing in the end zones after touchdowns.

This first *NFL Wild Card Game* special attracted more than two million viewers on Nickelodeon, and became the network's most-watched program in more than four years. And with CBS and CBS All Access (now Paramount+) audiences factored in, the game was the most-watched CBS Wild Card game in seven years with 30.6 million total viewers. It also generated more than two billion social media impressions.

Demand has only grown from there. Viewership for Nick's second *NFL Wild Card Game* in 2022 jumped by 35% to bring in more than 41.4 million viewers on CBS and Nickelodeon. And the NFL has partnered with Nick on two successful Christmas Day telecasts and the first-ever Super Bowl simulcast for kids, which attracted 1.2 million viewers on February 11, 2024.

The league also teamed up with Disney, ESPN, Sony-owned immersive content specialist Beyond Sports and New York-based virtual production house Silver Spoon on *Toy Story Funday Football*, arguably the NFL's most technologically ambitious simulcast to date, in that every element of the live game was replicated in the animated world of Pixar's Toy Story movie franchise. When it aired on October 1, 2023, it was the most-viewed live event ever on Disney+.

Beyond the record ratings, tech innovation and elevated social engagement, one of the biggest wins for sports leagues and their broadcast partners is the uptick in co-viewing for these kid-centric telecasts.

### UNITING FAMILIES

Sports viewing among kids is still largely driven by co-viewing moments, and more than 80% of all live sports viewing for kids ages two to seven includes an adult, according to research by ESPN and Disney.

***F1 Kids* telecasts increased from three races in the first season to seven in season two, including the Monaco and British Grand Prix events**

"As more kids watch with their parents, there's not only the halo of engaging the kid audience, but when networks like Nickelodeon and Disney+ are also promoting the game more broadly, you're driving an overall lift to the audience," says Grace Senko, VP of media strategy and business development for the NFL. "With Disney+, we were able to have the Toy Story game in 95 countries around the world, so streaming distribution is also a great way for us to reach a more global audience."

Turning from the gridiron to the rink, the NHL is generating a lot of co-viewing action with its kids telecasts, too. In partnership with ESPN, Disney Branded Television and Beyond Sports, the league's first animated simulcast on March 14, 2023—*NHL Big City Greens Classic*—attracted 765,000 linear viewers on ESPN, Disney Channel and Disney XD for the game between the Washington Capitals and the New York Rangers.

"We noticed that the animated simulcast drove a spike in the traditional live broadcast on ABC and ESPN+, so we're seeing a lot of side-by-side viewing happening," says David Lehanski, EVP of business development and innovation for the NHL.

To put this performance into perspective, the animated simulcasts on the Disney networks delivered a higher share of overall audience than any other previous NHL alternate presentation had, and ESPN's audience for the live game was its largest for an NHL game in nearly four months that season.

In terms of reaching more people on the periphery of the NHL fan universe, the Disney Channel and Disney XD telecasts were watched by a younger and more female audience than is typical for either network.

"For a regular NHL game, viewership is about 60% male to 40% female, and the average female audience for Disney Channel and Disney XD is 36% and 48%, respectively. But both Disney networks skewed 59% female for the telecasts," notes Lehanski. "We didn't know what to expect, but the results absolutely exceeded our expectations."

Piggybacking on that success, the NHL has since launched three additional fully animated kids simulcasts—a second *NHL Big City Greens Classic* (both are based in the world of Disney Channel's hit series *Big City Greens* from hockey-loving creators Chris and Shane Houghton); an NBC Sports Chicago telecast featuring the Chicago Blackhawks versus the Dallas Stars; and a simulcast in partnership with Warner Bros. Games and TNT Sports called *MultiVersus NHL Face-Off*, in which beloved Warner Bros. Discovery characters like Wonder Woman, Bugs Bunny and Steven Universe laced up in a game between the Colorado Avalanche and the Las Vegas Golden Knights.

As for key learnings, Lehanski says he was surprised by the number of repeat VOD views the telecasts generated. "In the first game, young kids probably liked the chicken referee that flies around and drops the puck as much as they liked the outcome of the game, and it led to repeat viewing. But we never really thought about it being as much of a show as it was a live hockey game, and that for kids, it's like watching a cartoon that you love a second time. So that's being factored into our vision for next season."

## GAINING TRACTION

Shifting gears to the high-octane world of motorsports, F1 has been making big moves to diversify its fan base since Liberty Media bought Formula One Group in 2017 for US$4.6 billion.

While its successful Netflix docuseries *Formula 1: Drive to Survive* has certainly played a role in this diversification and unlocked new content opportunities, it's just one part of a much wider strategy, says Isabelle Stewart, F1's head of original content.

To get a better sense of how quickly F1 has grown, since 2018 its fan base has ballooned to more than 700 million; one in three fans started following the sport in the last four years; female fans now account for 40% of its audience; and one in three fans is under the age of 35.

The brand's social media presence has also accelerated. Since 2018, the total number of F1 followers across all platforms jumped 278% to 70.5 million; its average views per race on YouTube rose by 336% to 10.9 million; and the US continues to be F1's largest audience on YouTube and TikTok.

In fact, YouTube is by far the most popular social media destination for following sports, ahead of TikTok, Instagram and Facebook, according to the SSRS Sports Poll. "There's definitely been a real shift towards a younger, more diverse audience," says Stewart.

With the ambition to build a 360-degree content pipeline that includes factual entertainment, drama and kids content, Stewart's team won pole position last year when F1 and its long-term partner Sky Group launched the first *F1 Kids* children's telecast of the

# THERE'S DEFINITELY BEEN A REAL SHIFT TOWARDS A YOUNGER, MORE DIVERSE AUDIENCE [FOR F1 RACING CONTENT].

—Isabelle Stewart, Formula One Group

The NHL's first animated simulcast, *NHL Big City Greens Classic* (here and below), was a massive hit on ESPN+, Disney Channel, Disney XD and Disney+

*Toy Story Funday Football* (here and above) became the most-viewed live event ever on Disney+ when it aired last October

Hungarian Grand Prix. The Sky UK and Sky Deutschland feeds featured custom 3D graphics and animation, kid-friendly team radio transmissions, driver avatars and technical explainers.

Additional F1-produced kids telecasts followed suit for races in Singapore and Abu Dhabi, which aired in more than 25 territories, including the US, Latin America and the Caribbean (ESPN); Canada (Bell); and Australia (Kayo Sports). "It's been a hugely successful initiative," says Stewart.

In fact, the feeds were so popular that the second season of *F1 Kids* this year has increased to seven live telecasts, including the Monaco, British, Dutch and Sao Paulo Grand Prix events.

## CRYSTAL-BALLING

Taking a long-term view, Stewart is excited by animation's possibilities and is in conversations with a handful of "really interesting" partners. The newest of these is Candle Media-owned Moonbug Entertainment, which first met with F1 at Kidscreen Summit last year. F1 has now agreed to provide content for two episodes of Moonbug's upcoming series *Go Go Blippi Show*.

And hinting at other storytelling angles that might come into play in future projects, Stewart adds: "What's interesting about F1, which is a bit different from other sports, is that it's a team sport featuring a wide range of skill sets. We want to show, particularly in our kids content, that you don't necessarily need to be a physical athlete to be on an elite sports team. F1 can also encourage kids to look at how STEM subjects can lead to a career in sports. That's a hugely exciting part of F1 storytelling for kids and is fairly unique."

Stewart is also enthusiastic about how F1 can tap into new social gaming and experiential opportunities for kids, having already invested in simulators, eSports and live exhibition experiences.

For the NFL's Senko, Roblox is particularly interesting as a distribution platform. "We could try to figure out some natural extensions in terms of showing NFL games in Roblox. That's something we're still evaluating," she says.

If the NFL is serious about taking its brand into the metaverse, it would join the NHL in that fandom-driven space. The hockey league's regularly updated Roblox experience, *NHL Blast*, has been red-hot with the platform's young users since it launched in 2023. Considering that kids who play a sports video game are almost three times more likely to be avid fans, it's not surprising that the NHL continues to invest.

"Every league and any IP owner in general—and certainly in the sports world—is going to develop more direct consumer experiences for products as time moves on," says Lehanski. "There's no doubt about it." k

Luminous Blue sees potential for its *Wolfire* anime-style soccer series to expand into toys, books, apparel and games

# TAKING THE FIELD

**As the sports content trend continues to heat up in the entertainment ecosystem, producers are looking to get into the game with new series concepts for kids.**

BY: RYAN TUCHOW

Coming out of the pandemic, when recreational and competitive sports for kids were shut down for months-long stretches at a time all around the world, it's no wonder that these pursuits are experiencing a massive resurgence in popularity across the board. Many children define their identities and form their friend groups around the sports they like or participate in, and athletic activities score a ton of points with parents as well—for the role they play in the development of confidence, leadership and teamwork skills, to their promise of fitness, mental health and outdoor time (depending on the sport, of course).

According to polls conducted by children's market research firm KidSay from January to December 2023, 92% of eight- to 11-year-olds in the US watch/follow/play sports or play sports video games. And across the pond, Childwise in the UK noted in its latest *Monitor Report* that 87% of kids ages seven to 18 played sports last year, averaging 2.4 hours per week outside of school and another 1.5 hours in school. Moreover, 22% were part of a sports club/team in 2023 (compared to 18% the year prior), and 19% visited a gym or fitness club (up from 11% in 2022).

With sports playing such a pervasive role in the lives of so many kids, it makes sense for content producers and buyers to use this hook to engage them. And there are plenty of new sports series concepts in development that are primed to hit the market soon.

## HENSON GETS IN THE GAME

In addition to working on *Adrenaline Lemmings*—a CG-animated/live-action series announced in June about four lemmings training for an X Games-style stunt competition—The Jim Henson Company has just put a brand-new unscripted live-action/puppet show with a sports theme into its pipeline.

*The Ultimate Goat* (TBD x 22 minutes) sees journalist and public speaker Rod Berger team up with an adventure-loving goat puppet named Earv to travel around the world in search of the GOAT (greatest of all time) in different sports.

The duo will explore a wide variety of countries and cultures, interviewing top athletes in sports ranging from soccer and football, to kookier disciplines like extreme ironing. Each episode will also feature a five- to seven-minute segment designed to help kids discover their own inner GOAT. Berger created the series, and longtime Henson puppeteer Victor Yerrid is attached as a writer, executive producer and Earv's performer.

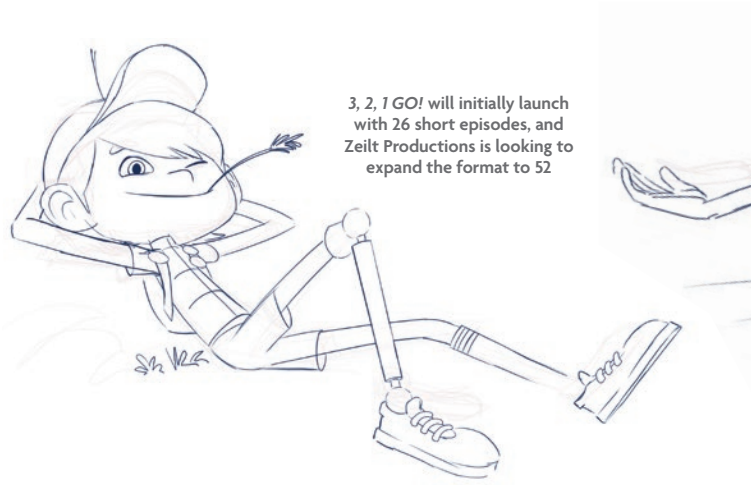
Sports is a new frontier for Henson, but it's a natural one because of its power to connect kids and families, says president of television Halle Stanford. Add to the mix a puppet as a conduit for physical comedy (Earv can be punted on a football field or rolled down a bowling alley, for example), and you have a recipe for success. The studio is currently constructing the puppet and plans to bring the series to market this fall.

"Of course we want kids up and moving after the pandemic, but sports also fosters community," notes Stanford. "Whether you're on

## DATA DEEP-DIVE
# TOP 10 SPORTS KIDS PLAY

| | IN SCHOOL | OUTSIDE OF SCHOOL |
|---|---|---|
| 01 | SOCCER | RUNNING/WALKING |
| 02 | RUNNING/WALKING | SOCCER |
| 03 | BASKETBALL | SWIMMING |
| 04 | ATHLETICS (TRACK AND FIELD IN THE US) | FITNESS TRAINING |
| 05 | RUGBY | CYCLING |
| 06 | NETBALL | BASKETBALL |
| 07 | TENNIS | TENNIS |
| 08 | BADMINTON | ATHLETICS/ GYMNASTICS (TIED) |
| 09 | GYMNASTICS | BOXING |
| 10 | SWIMMING | YOGA |

Source: ChildWise



*3, 2, 1 GO!* will initially launch with 26 short episodes, and Zeilt Productions is looking to expand the format to 52

the team or in the stands, you feel part of something in a really good way. More than ever, we need to feel like we're part of a global community, and sports can do that."

## ACTION IS WHERE IT'S AT

San Francisco-based Luminous Blue is taking a more action-driven approach to sports content with its new series *Wolfire* (52 x 11 minutes). In this anime-style adventure concept, a pack of red wolves sets out to train a team of fourth-grade kids for a high-level soccer championship featuring players from all corners of the animal kingdom. Targeted at kids ages eight to 10, the show has a US$3-million budget and is set for a fall 2025 delivery.

The series comes from a trio of Luminous execs who see several market gaps that it could potentially fill. Driven by his own experience with a son playing soccer, creative director Randy Gaul wanted to create a more "imaginative" kids sports series. *Wolfire*'s executive producer and Luminous CEO/founder Norman Praught sees value in a series where the protagonist has a rocky journey and is guided by a supportive coach. And writer John Edwards views the project as a chance to craft an animal-centric series with tougher characters that stand out from the "cutesy" critters common in kids TV. All of these motivations blended together to create a kid-centric series with strong licensing potential, says Praught.

This is Luminous Blue's (*Wubbles*) first-ever sports series for kids. But it's not much of a gamble, since sports are such a big part of kids' lives and there is room in the market for them, says Praught. The studio also sees potential to expand *Wolfire*—with its toyetic characters and focus on different powers and animals—into licensed sports toys, books, apparel and games.

## RIDERS ON THE SNOW

With Italy gearing up to host the 2026 Winter Olympics in Milan, it's a good time for Rome's Showlab (*YoYo*) to start pitching *Snow Riders* (12 x 22 minutes). In this 2D-animated concept (which has a bible, storylines and a trailer available to share), 15-year-old avid surfer Anna's lifestyle is turned upside down when her family moves from the seaside to Italy's snowy mountains. But things start looking up when she tries snowboarding for the first time, falls in love with the sport, and sets herself a goal to qualify for the Winter Olympics.

## AMERICAN FOOTBALL IS THE EIGHT TO 11 DEMO'S FAVORITE SPORT TO WATCH, BUT THEY PREFER TO PLAY EUROPEAN FOOTBALL (SOCCER).

—KidSay

Aimed at seven to 11s and budgeted at US$3.7 million, *Snow Riders*' coming-of-age adventure story also offers a gateway for exploring sustainability themes, says Micheline Azoury, Showlab's director of international sales and acquisitions. The future of winter sports is uncertain in the face of global warming, and at least one planned subplot will focus on Anna working with her dad to protect the local mountains from eco-terrorists.

### COUNTDOWN TO SPORTS

Taking a different approach, Luxembourg-based Zeilt Productions' *3, 2, 1 GO!* centers around five kids who aren't great at sports but who bond over giving them a try. They start filming these failed attempts and realize that the new skills they're learning can be applied to solving other problems. In one episode, the kids discover a treasure map and use new zipline skills to help one of them overcome a fear of heights and find the loot.

"For me, sport is about diversity—the diversity of sports, the diversity of athletes," says Laurent Witz, CEO and a producer Zeilt. "[I wanted to develop] a series whose heroes would be more exceptional for their singularity and their character than for their skills."

*3, 2, 1 GO!* was born out of seeing how isolation and a lack of physical activity was hurting children and their development during the pandemic, says Witz. His core objective was to develop a series that's in keeping with the philosophy of Pierre de Coubertin, the co-founder of the International Olympic Committee, who once said, "Sport seeks out fear in order to dominate it, fatigue in order to triumph over it, difficulty in order to overcome it."

Luxembourg broadcaster RTL is attached to *3, 2, 1 GO!*, and Zeilt has raised US$3 million of the 2D-animated show's US$4.8-million budget for 26 seven-minute episodes (although the producers would like to raise more financing from partners, co-producers and broadcasters to expand the format to 52 episodes).

### ROLLING ALONG

For TeamTO, sports are sometimes just about feeling like you belong—and that's what the Paris-based studio is zeroing in on with its 2D/CG-animated series *RIOT5* (10 x 22 minutes). Targeting the 12-and-up crowd, this concept revolves around roller derby, featuring lead character Griz, who forms the RIOT5 squad after she's kicked off her old team and dumped by her girlfriend, the team's captain. The only problem is that her current crew is mostly new to the sport, and they only have six months to train for the regional championships.

TeamTO decided to focus on roller derby because of its physicality and reputation as a welcoming sport for LGBTQ+ people, says executive producer Marine Tuloup. One storyline that leans into this second characteristic will see Griz fall for one of her teammates and struggle to balance her feelings with the desire to win.

*RIOT5* is TeamTO's first sports series, and it also represents the studio's first step towards aiming for an older audience. A show bible is complete, a pilot script is in the works for director Anaïs Caura (*Désintox, The Man-Woman Case*), and production is expected to start next summer for a Q1 2027 delivery.

"Roller derby is an empowering and emerging female sport, which makes it very inspiring and a great arena for comedy with fierce action," says Tuloup. "Its physicality and its beautiful philosophy of learning to fall and get back up again also gives it a very positive spin." k

# BACK TO THE DRAWING BOARD

## A pretty pig deal

Powerhouse preschool brand Peppa Pig has been bringing home the bacon for 20 years now, generating global annual sales in the region of US$1.7 billion in 2022.

The TV concept's porcine protagonists were born in the sketchbooks of creators Neville Astley and Mark Baker, who chose pigs because of the scope for anthropomorphism—everything from their cute snorts/oinks to their penchant for jumping in mud puddles was a perfect fit for emulating and engaging preschoolers.

"The ears were initially pointier, with some color depth," says Esra Cafer, Hasbro's SVP of franchise strategy and management for preschool & fashion. "Ultimately, they became more rounded and flattened in their coloring to get closer to the way young children draw."

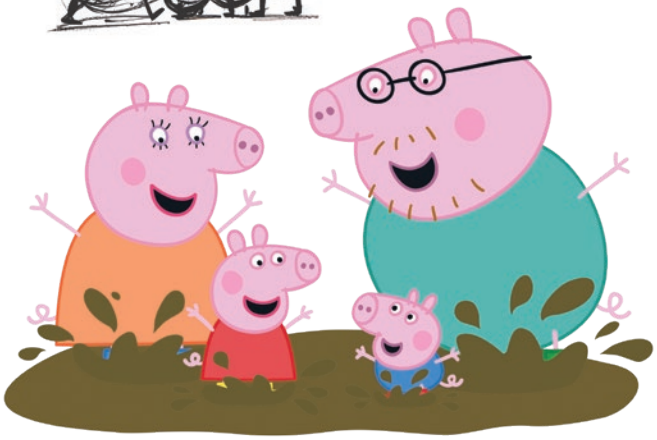
The creators' shingle Astley Baker Davies originally produced the series, with Karrot Entertainment taking the reins in 2021.

Peppa-mania hit global scale in the 2010s, says Hasbro Entertainment president Olivier Dumont, who played a key role in retooling how the show was scheduled. Rather than airing the five-minute episodes as stand-alones, he convinced international buyers to combine them into half-hour blocks like broadcasters in the UK typically did at the time. And this change proved to be crucial for maximizing the brand's exposure in Europe, Asia and Australia.

*Peppa Pig* made its US debut in 2005 as part of Cartoon Network's Tickle U preschool block lineup—but it was redubbed with American accents. "The perception at the time was that parents wouldn't accept [a show with British accents] in the US," Dumont explains. But that thinking had clearly changed by 2011, when Nickelodeon US bought the series and insisted on the original voice track—which is an iconic element of the show today as its broadcast footprint spans 180-plus countries.

— Sadhana Bharanidharan

*Peppa Pig*'s instantly recognizable visual style was designed to look like a child's drawing



Making the main character a pig allowed Peppa to get muddier and messier than real-life children are usually allowed to be

The series stood out in the preschool landscape thanks to its humor, which appealed to both kids and adults (an example being the famous "whistling" scene)

The character's ears were much pointier in Astley and Baker's original sketches

## FUN FACT

**Ever heard of the #PeppaEffect?**

Some US parents say their kids have been known to speak with an English accent and use British terms like "biscuit" and "mummy" after binge-watching *Peppa Pig*.

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